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Personal Communicator Client User Guide

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Welcome

The *Nortel Adaptive Application Engine Personal Communicator Client User Guide* provides you with the instructions necessary to get up and running with this product.

Topics include

- "Getting started" on page 27
- "Multimedia communication" on page 59
- "Presence" on page 99
- "Managing your contacts and calls" on page 107
- "Sharing" on page 143
- "Using the IM chat room" on page 167
- "Advanced set-up" on page 177
- "Troubleshooting" on page 243
- "Terms you should know" on page 261
- "Hardware notes" on page 267

Topics in this section include

- "Your Nortel Personal Communicator Client" on page 14
- "New in this release" on page 15
- "Personal Communicator Client and Multimedia Web Client services and features" on page 19
- "Personal Communicator Client configurations" on page 20
- "Text and graphic conventions" on page 23
- "Online help" on page 24
- "Related publications" on page 24
- "Language support" on page 24
- "How to get help" on page 25

Your Nortel Personal Communicator Client

This guide describes the capabilities of the Personal Communicator Client, a feature-rich user interface that transforms your PC into a powerful telephony and multimedia communications tool. In this guide, the Personal Communicator Client generically refers to two applications:

- Personal Communicator Client
- Multimedia Web Client

Both Personal Communicator Client and Multimedia Web Client support the same Graphical User Interface (GUI). Whether you access the Personal Communicator Client or Multimedia Web Client, you will mostly see the same call windows when making, receiving, or answering calls, and same icons and buttons to use various multimedia services, thus providing a unified experience to users of both clients.

Personal Communicator Client user interfaces

Personal Communicator Client offers two different user interfaces, also known as themes, for user to choose from on their desktops.

Theme	Description
Standard	This theme is the new look and feel of the Personal Communicator Client for this release. When you launch the Personal Communicator Client, it defaults to the standard interface.
Classic	This theme is the classic look and feel of the Personal Communicator Client. It provides numerous quick action buttons from the main page. This GUI is dramatically different from the standard GUI.
Although the Personal Communicator Client GUIs look different, they have similar features and operations.	

You have the option to change the Personal Communicator Client interface based on how you want your client to look on your desktop. The Standard interface provides two styles: Black and Silver. You can select a style from User Interface in the Preferences window. The Classic interface provides two font styles: Standard and Large. You can select the font from User Interface in the Preferences window. To select the Personal Communicator Client theme of your preference, see "Specifying user interface settings" on page 223.

Note that this guide describes the Nortel Standard and Classic Personal Communicator Client interfaces.

New in this release

The following sections detail what's new in *Nortel Adaptive Application Engine Personal Communicator Client User Guide* for release Adaptive Application Engine 7.0 Service Package 1 (SP1).

- "Features" on page 15
- "Other changes" on page 18

Features

See the following sections for information about feature changes:

- "Softclient Portfolio Refresh Phase 2" on page 15
- "PC Client Control of SIP terminals (PCCoST)" on page 16
- "Softclient Portfolio Refresh Phase 3" on page 16
- "USB HID Support" on page 17
- "Caller Name Presentation" on page 18

Softclient Portfolio Refresh Phase 2

Softclient Portfolio Refresh Phase 2 introduces enhancements in user interface elements and new specialized features. The following changes were made based on this feature:

- Updated "Main menu actions" on page 45

- Updated "Main buttons" on page 47
- Updated "Initiating a voice or video call using the Standard interface" on page 63
- Added "Receiving a call" on page 65
- Updated "Receiving a call" on page 65
- Added "Receiving a new call during a call" on page 68
- Updated "Answering a voice or video call" on page 69
- Updated "Specifying call pop-up behavior" on page 218

PC Client Control of SIP terminals (PCCoST)

PC Client Control of SIP terminals (PCCoST) adds a new converged mode of operation to the Nortel Multimedia PC Client (PCC). This new mode enables a subscriber to use an existing SIP terminal for voice while using the PCC for call control and multimedia portion of calls. The following changes were made based on this feature:

- Modified "Setting up Nortel IP Phones (optional)" on page 209
- Added "Setting your Nortel IP Phone for UNISTIM" on page 210
- Added "Setting your Nortel IP Phone for SIP" on page 211
- Deleted "Starting your MeetMe Conference bridge" section from "Multimedia communication" on page 59
- Deleted "Using the Short Message Service" from "Multimedia communication" on page 59
- Deleted "Setting SMS preferences" from "Advanced set-up" on page 177

Softclient Portfolio Refresh Phase 3

Softclient Portfolio Refresh Phase 3 introduces further enhancements in user interface elements and new specialized features. The following changes were made based on this feature:

- Added "Personal Communicator Client without voice" on page 23
- Updated the screen shot in "Navigating the Personal Communicator Client" on page 43
- Added a tip to "Making a call" on page 60
- Added a tip to "Conference calling" on page 79

- Added "Querying the presence of a user in an instant message conversation window" on page 87
- Added "Clearing your instant messages history" on page 89
- Added a tip to "Using voicemail" on page 91
- Added the missing link for "Creating custom presence state notes" on page 104 to "Managing your presence" on page 103
- Added a tip to "Managing your call logs" on page 107
- Added "Viewing your missed calls" on page 110
- Removed unnecessary screen shot from Step 2 of "Personal address book entry commands" on page 116
- Updated table in "Personal address book entry commands" on page 116
- Updated screen shot and steps in "Adding a personal address book entry" on page 118
- Modified "Entry commands for your contacts" on page 140
- Modified introduction and added a tip to "Starting a sharing conversation" on page 144
- Modified "Receiving files" on page 156
- Modified "Configuring your preferences" on page 177
- Added a tip to "Selecting audio devices" on page 183
- Added a tip to "Selecting alerting sounds" on page 187
- Modified "Specifying user interface settings" on page 223
- Added "Closing a window" on page 226
- Added "Selecting system colors for IM log" on page 226

USB HID Support

USB HID Support allows Nortel SIP products, such as PC Client (PCC), Lotus 8 Client and Multimedia Office Client (MOC), to support USB headset adapters other than the Nortel one. In addition to the Nortel USB headset adapter, the following USB headset adapters are supported:

- GN Netcom 2100 USB
- GN Netcom 9330 USB
- Sony Ericsson VoIP Kit HBV-100

Other USB HID headset products might function with the Nortel SIP products, but they have not been tested and Nortel does not offer customer support service for them. The following change was made based on this feature:

- Modified "Selecting audio devices" on page 183

Caller Name Presentation

Caller Name Presentation makes the remote party identity display consistently in the PCC. This adjustment applies to all modes of the PCC. If a match in the Personal Address Book (PAB) is found, the remote user nickname is displayed everywhere where it is applicable:

- session window title
- under the user picture
- session window tooltips
- task bar
- chat window
- To/From field in call logs (for outgoing/incoming calls)

The following change was made based on this feature:

- Modified "Adding a personal address book entry" on page 118

Other changes

See the following sections for information about changes that are not feature-related:

- Updated "Related publications" on page 24
- Throughout this document, previous references to Session Server Lines (SSL) are changed to Communication Server 2000 - Adaptive Application Engine/ Session Server Line (CS2000-A2E/SSL).
- Added "Declining a call" on page 73
- Updated "Launching the Multimedia Web Client" on page 40
- Updated "Personal Communicator Client and Multimedia Web Client services and features" on page 19

- Replaced the screen shot in "Accessing received files" on page 157
- Updated "Language support" on page 24

Personal Communicator Client and Multimedia Web Client services and features

This guide describes all services and features available on the Personal Communicator Client and Multimedia Web Client, although the actual set of services and features available to the user is determined by the user's administrator or service provider.

Access to some of the features listed below depends on the services and service profiles assigned to you for each service wherever applicable. Contact your system administrator for this information or check your **Personal Agent, Preferences, Services, Service package**.

The Personal Communicator Client is an application that provides advanced IP telephony features, many of which are not available on a traditional telephone:

- Internet Protocol (IP) calls
- advanced call logging to keep track of incoming, outgoing, and missed calls
- personal address book, which is stored on the network and synchronized across clients
- global address book, which is stored on the network
- presence to see who is online and let others know that you are online
- control of Nortel IP Phones (Standalone users only)
- call hold/retrieve (Standalone users only)
- call park/retrieve (Standalone users only)
- call transfer (direct or consultative)
- file transfer to send and receive files
- sharing tools, such as web push, shared whiteboard, shared clipboard
- do not disturb (DND)
- IM chat to create a chat room or join an existing private, public, or public with password chat room
- call handling to decline, redirect, or ignore incoming calls

- instant messaging to send and receive text messages
- video calls (on demand, one-way, and two-way video)
- conference calls (requires network conference server)
- Assistant support service (Standalone users only)
- Assistant console service (Standalone users only)
- Outlook plugin support for Microsoft Outlook that allows you to make calls from and import contacts from Microsoft Outlook 2000 and above (supported on the Personal Communicator Client only, not on the Multimedia Web Client).

The Multimedia Web Client is a lighter version of the Personal Communicator Client. It includes most of the services listed above, with the following exceptions:

- control of Nortel IP Phones
- Outlook plugin support for Microsoft Outlook that allows you to make calls from and import contacts from Microsoft Outlook 2000 and above (Personal Communicator Client only)
- Assistant console service
- Classic theme

Personal Communicator Client configurations

The Personal Communicator Client is available in the following configurations:

- "Personal Communicator Client" on page 20
- "Personal Communicator Client Set" on page 21
- "Personal Communicator Client with Converged Desktop service" on page 22
- "Personal Communicator Client without voice" on page 23

Personal Communicator Client

The Personal Communicator Client software application runs on your PC and provides access to SIP features and multimedia services.

Most users will choose to use a headset to speak and hear during calls. Optionally, you can use a separate microphone and your computer's speakers for the voice part of the call (not recommended in open office environments).

Tip: Keep the Personal Communicator Client running in the background whenever you are using your computer so you can easily accept incoming calls.

Personal Communicator Client Set

Tip: This section applies to Standalone users only.

The ability to have the Personal Communicator Client control a Nortel IP Phone depends on your services and service profiles assigned to you for each service wherever applicable. If the Allowed Clients service with the PCClientSet Control is not enabled, you will not be able to use the Personal Communicator Client Set feature.

When the Personal Communicator Client controls a Nortel IP Phone, the configuration is called a Multimedia Client Set. The Nortel IP Phone provides premium-quality voice, while your computer is dedicated to the data and video components of the multimedia conversation.

The Multimedia Client Set is ideal when your conversations include processing-intensive tasks, such as real-time video, which would otherwise consume the bandwidth (CPU and network) required for voice processing.

To configure the Personal Communicator Client to control your Nortel IP Phone, see "Setting up Nortel IP Phones (optional)" on page 209.

Personal Communicator Client with Converged Desktop service

Tip: This section applies to Standalone users only.

With Session Initiation Protocol (SIP)-based Converged Desktop service, your desktop telephone provides premium-quality voice, while your computer is dedicated to the data components of the multimedia session. The Personal Communicator Client with Converged Desktop service configuration is a cost-effective solution that allows you to maintain your existing desktop telephone for voice calls, while using the Personal Communicator Client for multimedia communication, such as adding video to a call, starting a collaboration session, or beginning an instant messaging session.

There are various versions of the Converged Desktop service. Those versions are

- SimRing Converged Desktop

  In this configuration, the CS 2000 is set to SimRing and the user is provisioned as a standard user with a Personal Communicator Client that is not using Converged Desktop service (regular Personal Communicator Client). This configuration is supported over PRI (DMS 100 switch).

- Personal Agent-driven Converged Desktop service

  This configuration is used between an Adaptive Application Engine (A2E) and systems that do not support SimRing.

- SIP-based Converged Desktop service

  This configuration is a full-feature version of Converged Desktop and uses basic Advanced Intelligent Network (AIN) call flows to provide Time Division Multiplex (TDM) voice and multimedia convergence to class 5 lines that support AIN call flows.

For information about the Converged Desktop feature and its capabilities, consult your service provider.

Personal Communicator Client without voice

When your Personal Communicator Client is not enabled for voice, you cannot make voice or video calls. Consequently, Call buttons, Call context menus, Call Logs, and all options requiring voice or video capability are unavailable to you. However, you can use your Personal Communicator Client without voice for sending and receiving instant messages and for starting a collaboration session, which enables you to send files, transfer clipboard, send a web page, and share whiteboard with another user.

Text and graphic conventions

This guide uses the following text conventions:

bold text	Indicates the command key you need to press Example: Press **Ok**.
italic text	Indicates new terms, document titles

Personal Communicator Client documentation shows Internet Explorer as the default browser. However, if you are using another browser (for example, Firefox), your screen may look slightly different. Also, screen captures and menus show the full content of the Personal Communicator Client functionality. Additionally, your screen may look different depending upon your operating system, such as Microsoft 2000, Microsoft XP, or Microsoft Vista.

This guide describes the Nortel standard and classic Personal Communicator Client Graphical User Interfaces (GUIs). Alternate GUIs may look different but have similar features and operation as the Nortel standard Personal Communicator Client GUI.

The GUI that is presented in this document may or may not be fully present, based upon what is enabled by your administrator and the services and service profiles assigned to you wherever applicable.

We recommend that you keep your client open when you follow the steps described in the Personal Communicator Client documentation.

Online help

There are several ways that you can access Personal Communicator Client help.

Do this	To receive this	From
Roll your mouse over a button on the Personal Communicator Client main interface.	a small help description of the button	the tool tip help
Roll your mouse over an icon to see the tool tip help.	the most relevant information in the tip displayed on the Personal Communicator Client, such as • your presence status. • whether or not there are new calls. • whether or not there are new voice mail messages	the tool tip help from the system tray icon
Select **Help, Contents** from the Personal Communicator Client main menu to view a PDF-based user guide.	• information about procedures that help you use the Personal Communicator Client. • a table of contents with hypertext links. • search method within the document.	the online help

Related publications

Other publications related to the *Nortel Adaptive Application Engine Personal Communicator Client User Guide* include *Nortel Adaptive Application Engine Personal Agent User Guide* (NN48111-119).

Language support

The Personal Communicator Client Guide is available in nine localized languages:

- English
- French
- Japanese
- Simplified Chinese
- German
- Spain Spanish
- Korean
- Portuguese
- Traditional Chinese
- Russian

How to get help

For services issues, contact your local support or Information Services team.

Chapter 1
Getting started

Topics in this section include the following:

- "Before you begin" on page 27
- "Installing and launching the Personal Communicator Client" on page 30
- "Security Alerts when Accessing the Personal Communicator Client" on page 37
- "Signing on to the Personal Communicator Client" on page 38
- "Automatically starting the Personal Communicator Client" on page 40
- "Launching the Multimedia Web Client" on page 40
- "Navigating the Personal Communicator Client" on page 43
- "Making an emergency call" on page 54

Before you begin

You need the following items to start using the Personal Communicator Client:

- a PC configured with the required minimum software and hardware, as described in the following section
- network access with a connection that meets the minimum transmission speed requirements, as described in the following section

Minimum hardware and operating system requirements

The following configuration allows for voice-only sessions:

- 550-MHz Pentium-III or equivalent processor
- Windows 2000, Windows XP, or Windows Vista

- 56-Kbit/s modem
- microphone and full-duplex sound card
- 48-MB free RAM (This requirement is in addition to the memory requirements of the OS and other concurrent applications.)
- 50-MB free hard-disk space
- 640x480 @8bpp (256 colors) VGA graphics card
- mouse
- PC speakers internal or external connected to the sound card

If a separate microphone and speakers are used instead of the recommended headset, then users must select the Echo Reducer option as detailed in "Advanced set-up" on page 177. Otherwise, other parties may experience an annoying echo while on a call.

Recommended hardware and operating system requirements

The following configuration allows for Medium-Bandwidth video and simultaneous voice and sharing sessions:

- 2.0 (or higher) GHz Pentium-4 or equivalent processor
- Windows 2000, Windows XP, or Windows Vista
- 56-Kbit/s modem or faster network connection (Cable modem, DSL, 10base-T Ethernet connection will provide a better user experience.)
- Broadband internet connection of sufficient speed (See "Setting your connection speed" on page 180.)
- 64-MB free RAM (This requirement is in addition to the memory requirements of the OS and other concurrent applications.)
- 50-MB free hard disk space
- 800x600 @16bpp (65,536 colors) VGA or better video graphics card
- mouse
- full-duplex sound card with speakers (external or built in)
- separate USB headset or analog headset with built-in microphone

With speakers connected to the PC sound card, you will be able to send the ringing (alerting sounds) through the PC's speakers and use a USB headset for voice and audio while on a call. This will enable you to be away from your desk and still be able to hear an incoming call with this combination. Otherwise, the alerting tones would only get played through the headset if this combination is not used, or if an analog headset (non-USB headset) that connects directly to your PC's sound card is used. For more information, see "Selecting audio devices" on page 183.

Best performance hardware and operating system requirements

The following configuration allows for high-bandwidth or custom-configured video and simultaneous voice, sharing, and web collaboration (point to multi-point application sharing) sessions:

- 3.0-GHz (or higher) Pentium-4 or equivalent processor
- Windows 2000, Windows XP, or Windows Vista
- high-speed network connection (10base-T Ethernet or better)
- 64-MB free RAM (This requirement is in addition to the memory
- requirements of the OS and other concurrent applications.)
- 50-MB free hard disk space
- 800x600 @16bpp (65,536 colors) VGA or better video graphics card
- mouse
- full-duplex sound card with speakers (external or built in)
- separate USB headset or analog headset with built-in microphone

Optional hardware and software requirements

The following optional hardware and software are required to use some services and features:

- Nortel IP Phone is needed to receive services requiring a hard set, including Personal Communicator Client Set and Personal Communicator Client with Converged Desktop Service. (Standalone users only)
- A Web browser is required to use Auto Web Push:

  - — Internet Explorer 6.0 and above
  - — Firefox 2.0 and above
- Microsoft Outlook 2000 and above is required if you want to use the Microsoft Outlook AddIn or Import Contacts features.
- A USB-based video camera (Web Cam) is required to send video. A 16bpp (65,536) VGA or better video graphics mode is required in order to send video. For more information about video camera support, see "Compatible video cameras and headsets" on page 267.

Some PCs (not all) may not have sufficient USB bandwidth to support a USB camera and USB headset. This is not an issue if you are using a Nortel IP Phone for voice instead of PC, or using an analog headset that connects to the sound card instead of USB port. For more information, go to **Help, Contents, Troubleshooting, Audio problems, Choppy audio** when using USB headset. Additionally, some USB cameras could cause a blue screen error. For more information on this issue, go to **Help, Contents, Troubleshooting, Video, Blue screen error**.

Installing and launching the Personal Communicator Client

This section shows how to install and launch the Personal Communicator Client software. Topics include

- "Installing the Personal Communicator Client" on page 30
- "Launching the Personal Communicator Client" on page 33

Tip: Close all other applications before installing the Personal Communicator Client.

Installing the Personal Communicator Client

The installer application walks you through the installation process, allowing you to select options, including

- the location where you want to install the Personal Communicator Client
- whether to install the Personal Communicator Client for the current user or all users who share this computer. This installer option must be enabled by your administrator. Administrator rights are required to install the Personal Communicator Client for all users.
- whether or not to let the Personal Communicator Client install a desktop icon
- whether or not to let the Personal Communicator Client install the Microsoft Outlook plugin
- whether or not the Personal Communicator Client starts automatically when the PC restarts
- whether or not you would like to view any important release notes

Tip: End users need administrator privileges to install the Personal Communicator Client.

To install the Personal Communicator Client,

1 Double-click the Personal Communicator Client **install file** you downloaded or received on CD.
A standard Security Warning dialog can appear listing the publisher of the Personal Communicator program. Select **Run** if the program is provided by an acceptable publisher. Note that administrator privileges are needed to

install the PC Client, and it might be necessary to enter an administrator's password at certain steps.

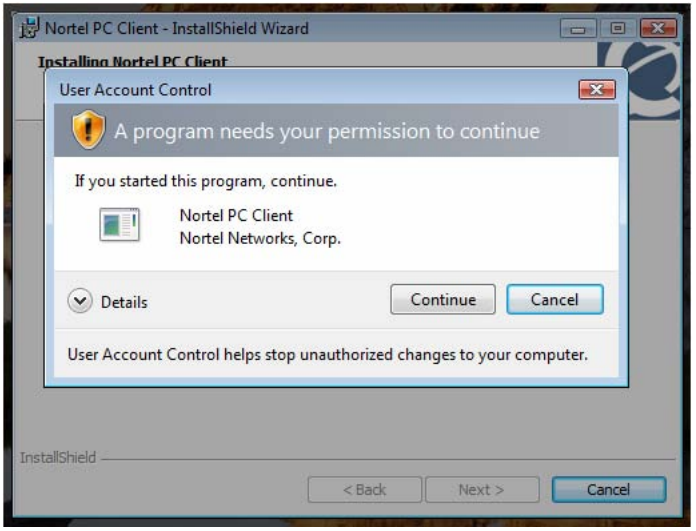
Nortel PC Client - InstallShield Wizard
Welcome to the InstallShield Wizard for Nortel PC Client
The InstallShield(R) Wizard will install Nortel PC Client on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
NORTEL
< Back
Next >
Cancel

2 Select the local language used by the installation process.
A few installation dialogs appear in sequence.

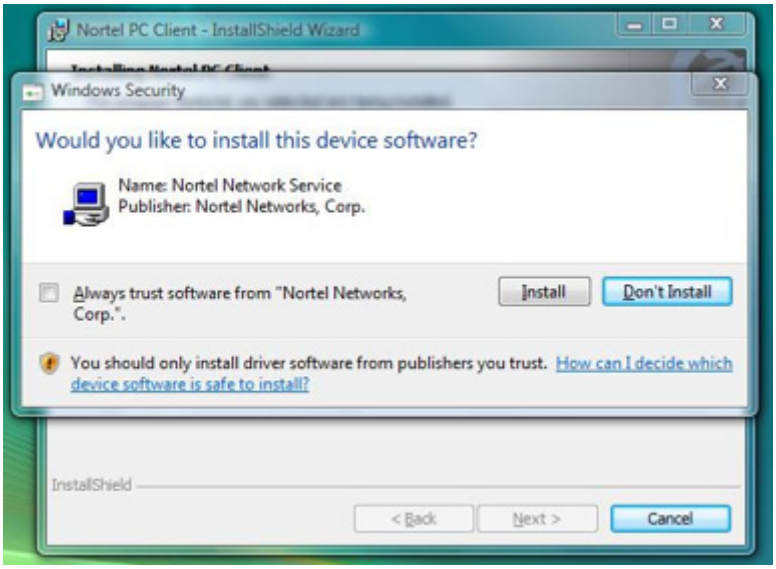
3 Select the installation options that you desire.

4 Click **Next** to proceed.

5 At the final dialog, click **Install** to proceed with installation.
If your operating system is Vista, two UAC windows appear.



6 If you see the two UAC windows, click **Continue**.
A standard Windows Security dialog appears.


Nortel PC Client - InstallShield Wizard
Windows Security
Would you like to install this device software?
Name: Nortel Network Service
Publisher: Nortel Networks, Corp.
Always trust software from "Nortel Networks, Corp.".
Install
Don't Install
You should only install driver software from publishers you trust. How can I decide which device software is safe to install?
InstallShield
< Back
Next >
Cancel

7 Click **Install**.
A final Client installation dialog appears with options for launching.

8 Select your desired options.

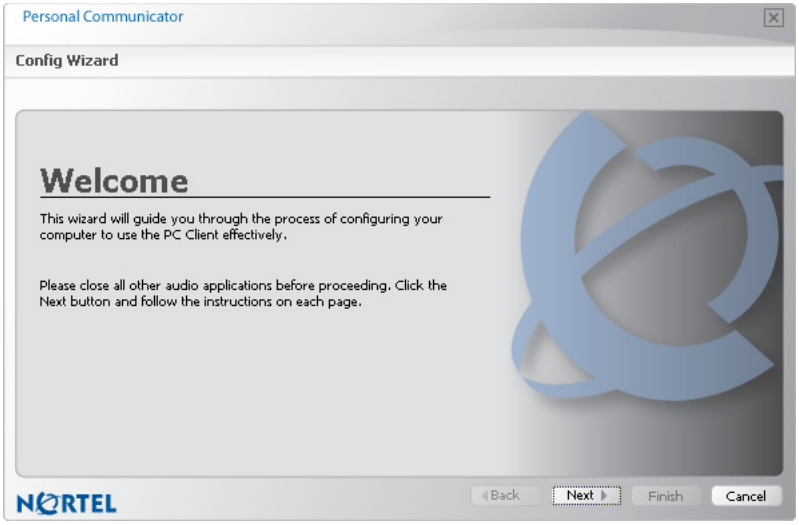
9 Click **Finish** to complete the installation procedure.

Tip: Administrator privileges are required from users, in order to install clients. After the installation, clients can be run in standard user mode. It is important to note that if the UAC mode is turned off, the standard user will not be prompted for an administrator user's password required for successful installation, which will cause installation failure.

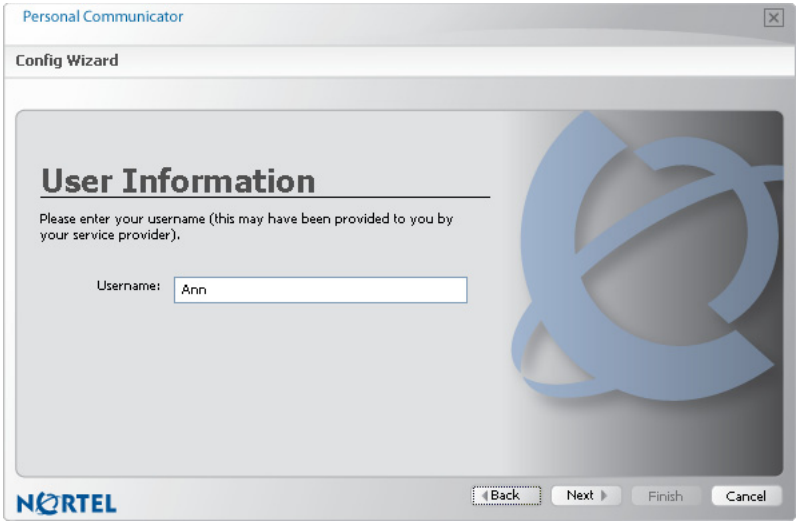
Launching the Personal Communicator Client

Double-click the **desktop** icon (if present) or select the **Nortel Personal Communicator Client** from the Windows Start Menu to open the Personal Communicator Client application.

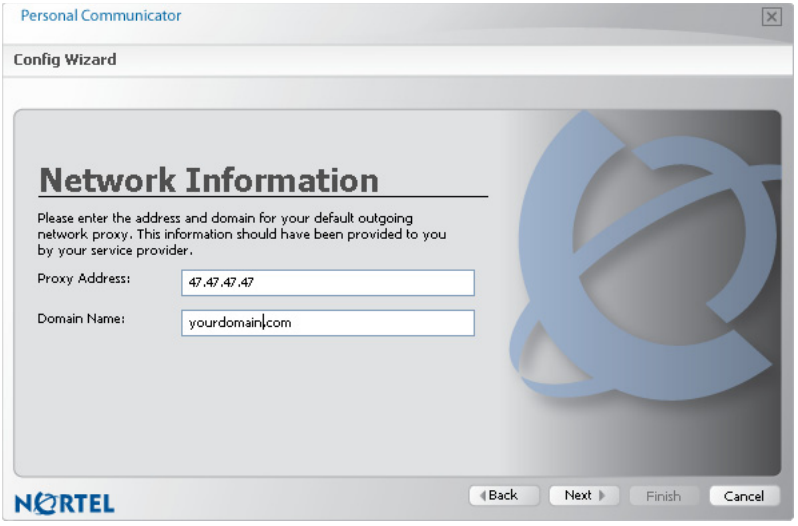
The first time you use the application, a wizard appears to walk you through the Personal Communicator Client configuration. Follow the prompts that appear on your screen.


Personal Communicator
Config Wizard
Welcome
This wizard will guide you through the process of configuring your computer to use the PC Client effectively.
Please close all other audio applications before proceeding. Click the Next button and follow the instructions on each page.
NORTEL
Back
Next
Finish
Cancel

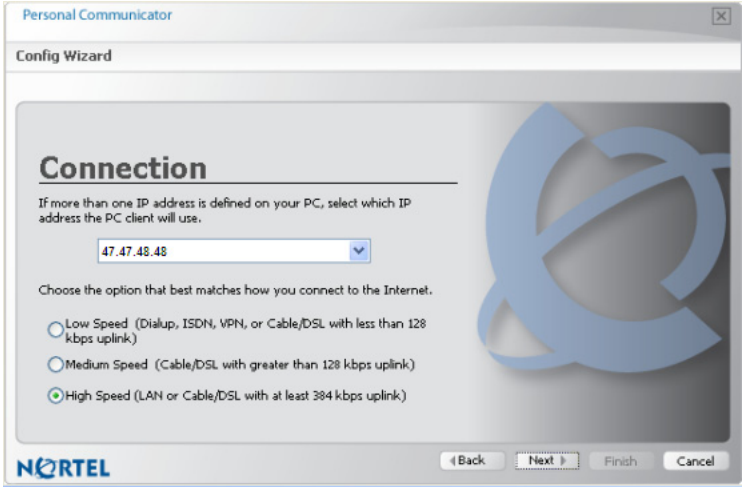
In the User Information page, provide your username. Your administrator gives you your username.



In the Network Information page, provide (or verify) the IP address and domain for the default proxy server. Either the system automatically fills in this information for you or your administrator can provide it.

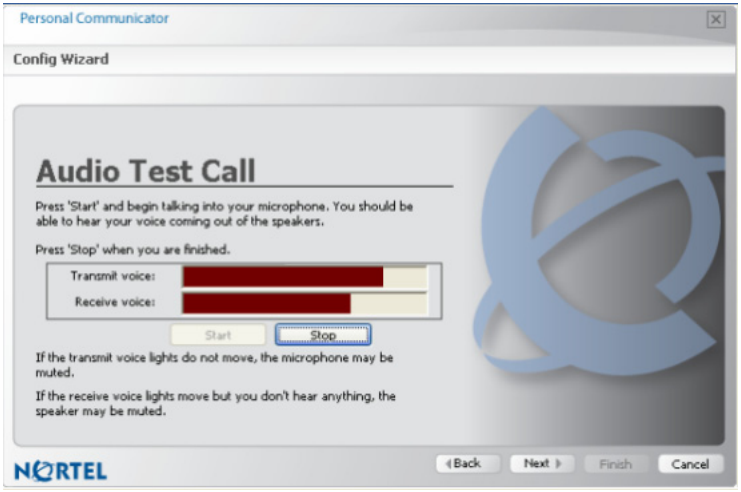


In the Connection page, verify that your IP address is shown. Also, select the connection speed that best matches your network connection speed. Remember, the default speed is Medium.

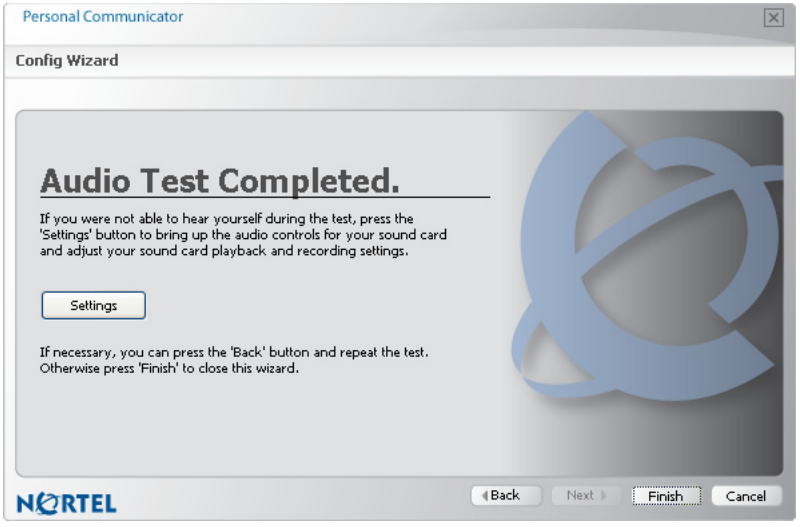

Personal Communicator
Config Wizard
Connection
If more than one IP address is defined on your PC, select which IP address the PC client will use.
47.47.48.48
Choose the option that best matches how you connect to the Internet.
Low Speed (Dialup, ISDN, VPN, or Cable/DSL with less than 128 kbps uplink)
Medium Speed (Cable/DSL with greater than 128 kbps uplink)
High Speed (LAN or Cable/DSL with at least 384 kbps uplink)
NORTEL
Back
Next
Finish
Cancel

The Audio Test Call page is where you can test your microphone and speakers to ensure proper audio send and receive levels.

Tip: Converged Desktop users can click **Next** to skip the Audio Test Call step.

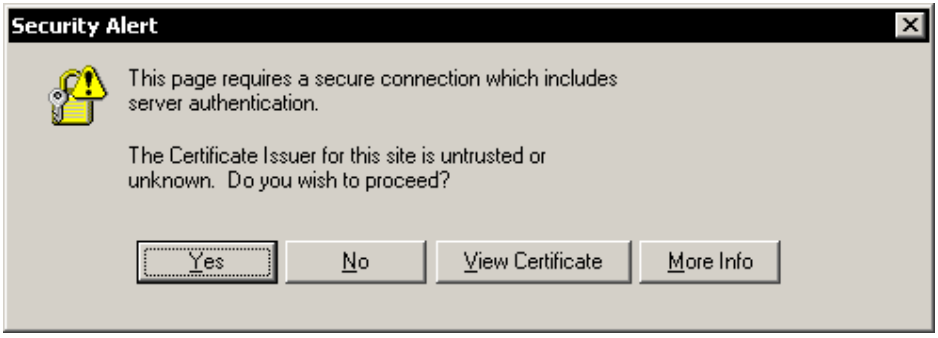

Personal Communicator
Config Wizard
Audio Test Call
Press 'Start' and begin talking into your microphone. You should be able to hear your voice coming out of the speakers.
Press 'Stop' when you are finished.
Transmit voice:
Receive voice:
Start
Stop
If the transmit voice lights do not move, the microphone may be muted.
If the receive voice lights move but you don't hear anything, the speaker may be muted.
NORTEL
Back
Next
Finish
Cancel

Once the audio test is complete, click **Finish** to end the configuration wizard.


Personal Communicator
Config Wizard
Audio Test Completed.
If you were not able to hear yourself during the test, press the 'Settings' button to bring up the audio controls for your sound card and adjust your sound card playback and recording settings.
Settings
If necessary, you can press the 'Back' button and repeat the test. Otherwise press 'Finish' to close this wizard.
NORTEL
Back
Next
Finish
Cancel

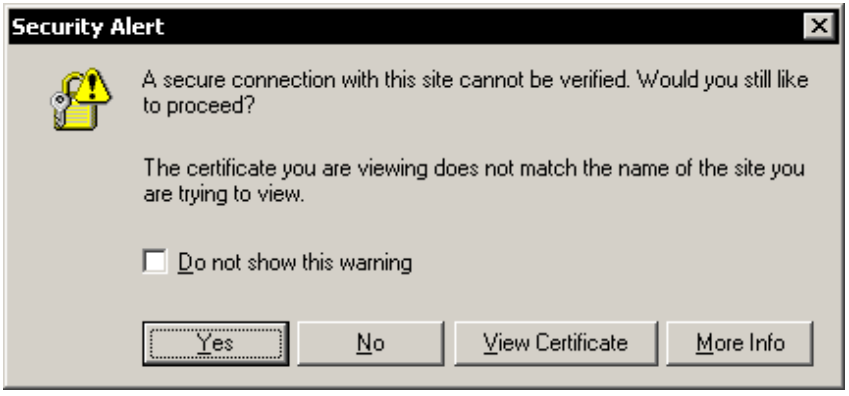
Security Alerts when Accessing the Personal Communicator Client

When you access the Personal Communicator Client, the following Security Alert dialog boxes can appear, depending on your configuration.


Security Alert
This page requires a secure connection which includes server authentication.
The Certificate Issuer for this site is untrusted or unknown. Do you wish to proceed?
Yes
No
View Certificate
More Info

When the dialog box appears, you must perform the following steps:

1 Click **Yes**. Another Security Alert dialog box appears.


Security Alert
A secure connection with this site cannot be verified. Would you still like to proceed?
The certificate you are viewing does not match the name of the site you are trying to view.
Do not show this warning
Yes
No
View Certificate
More Info

2 Click **Yes**.

You now have access to the client.

Signing on to the Personal Communicator Client

You will be prompted to sign on to the Personal Communicator Client when you launch it. At other times (for example, if you disconnect or lose connection with the server), you may need to manually sign in.

Tip: If you chose the option to have the Personal Communicator Client automatically start up, and you set your Network preferences to automatically connect to your proxy server, be sure to select the **Remember my password** option so that you won't have to type your password during sign in.

1. Select **Login** and the button beside your default proxy server IP address. The Authorization Required window appears with your proxy server's IP address and your username. The Personal Communicator Client login window appears.
2. Enter your password. Click on the **Remember my password** check box if you do not want to enter your password every time you sign in.
3. Click the **Sign me in automatically** check box if you want the Personal Communicator Client to automatically sign in.

Tip: If you select both options (**Remember my password** and **Sign me in automatically**), then you will not be prompted with the sign in window again.

4. Click **OK**.

   Your service provider or system administrator restricts the number of concurrent logons that you can have using a Personal Communicator Client, Multimedia Web Client, Nortel IP Phone, or a Personal Communicator Client Set. If you are logged on to other devices, you can log off from the other device and try logging on again. Otherwise, contact your system administrator if you receive an error message stating that you have exceeded your logon limit.

5 Select your **Location**.

Tip: The physical location you choose becomes your default location whenever you log on to the Personal Communicator Client until you decide to change it again. If you are using the classic Personal Communicator Client GUI, then your physical location appears on the top right of the main GUI.

Caution: You must provide the correct location information on your Personal Communicator Client; otherwise, some services, such as emergency and conferencing services, may not work properly. For example, the location you choose determines where you are during an emergency. If you choose **Other** as your default location, and you have to make an emergency call, the emergency call may route to the incorrect Public Safety Answering Point (PSAP).

If you are logging on from a different location, ensure that you change your location from the Sign In window or access the **Tools, Preferences, Users** tab from the main menu. For more information, see "Setting up your user profile" on page 178.

6 Click **OK**.

If you choose **Other** as your default location, the following warning box appears.

Default Location Selected
Your location is set to a default value. This selection may affect emergency services. You may reset your location at any time by selecting the change location button on the User tab in the Preferences or by clicking the location on the main GUI.
OK
Don't show me this message again

7 Select **Don't show me this message again** if you do not want this window to appear again when you log on to the Personal Communicator Client.

Automatically starting the Personal Communicator Client

The Personal Communicator Client installation gives you the option of having the client start automatically whenever you log on to your computer. If you do not choose this option and you would still like to start the client automatically with Windows, perform the following steps (dependant on your Windows configuration):

If you are running Windows 2000,

1. Drag-and-drop the desktop **Nortel Personal Communicator Client** icon onto the task bar **Start** button.
2. Place the file into the Programs Startup program group.

If you are running Windows XP, and Windows Vista,

1. Right-click on the **Start** button, and then click **Properties**.
2. On the **Start Menu** tab, click **Classic Start menu**, and then click **Customize**.

   This changes the style of the **Start** menu.
3. Click **Advanced**.
4. In the Start Menu folder, find the shortcut to the program you want to start each time you start Windows, and drag it to the Startup folder located in the Programs folder.

Launching the Multimedia Web Client

Just as the Personal Communicator Client, you can run Multimedia Web Client on Windows 2000, Windows XP, and Windows Vista. In order for the Web Client to run successfully on Windows Vista, you require a Java Runtime Environment compatible with Windows Vista (version 6 or above).

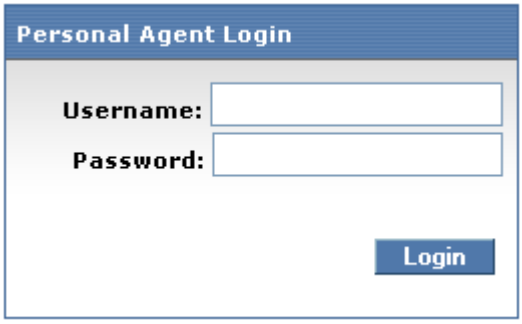
The Multimedia Web Client is accessible from the Personal Agent main page. To launch the Multimedia Web Client software, you must first access the Personal Agent through your Web browser.

Before you log on to the Personal Agent, ensure that you have the Personal Agent URL from your service provider or system administrator. Also ensure that you have your username and password to access the Personal Agent. To log on to the Personal Agent for the first time,

1 Start your Web browser.

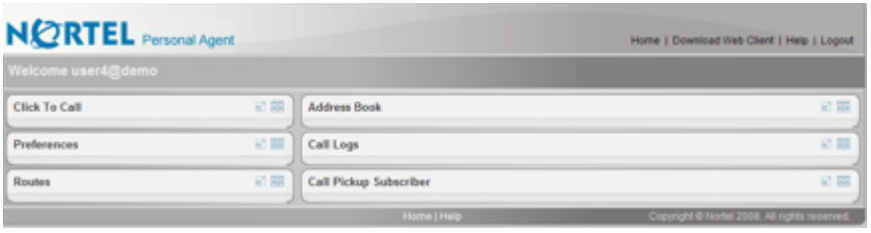
2 Enter the Personal Agent URL in your Web browser.
The Personal Agent URL is given to you by your service provider or system administrator.

3 Press **Enter**.
The Personal Agent Login page appears.



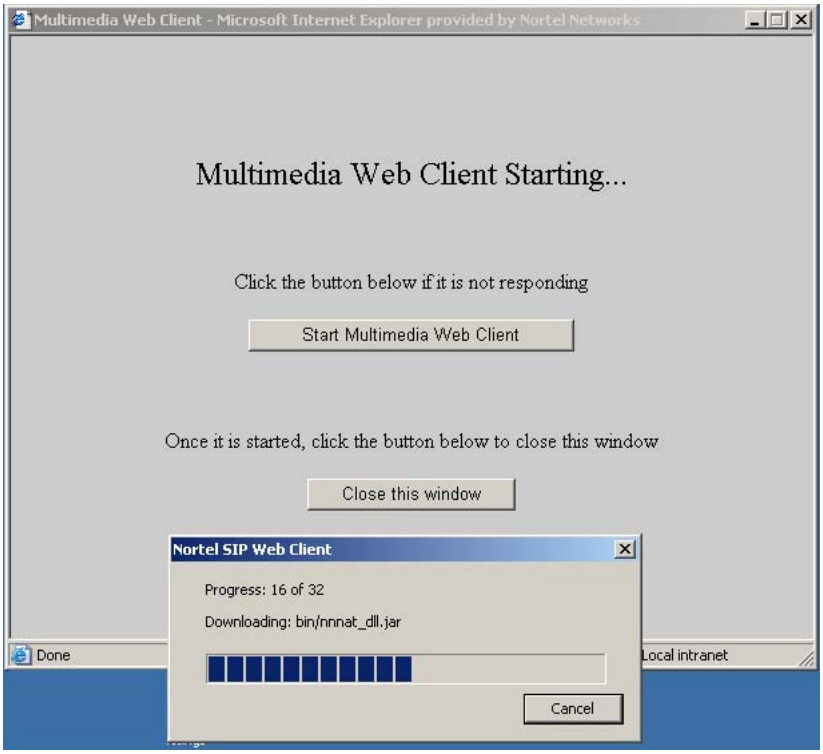
4 Enter your username or domain name (for example: you@yourcompany.com), and password.

5 Click **Login**.
The Personal Agent main page appears.



6 Click **Download Web Client** from the top navigation menu.

If you are accessing the Multimedia Web Client for the first time, a number of files start downloading to your computer. Once the download completes, the Web Client launches on your desktop.


Multimedia Web Client - Microsoft Internet Explorer provided by Nortel Networks
Multimedia Web Client Starting...
Click the button below if it is not responding
Start Multimedia Web Client
Once it is started, click the button below to close this window
Close this window
Nortel SIP Web Client
Progress: 16 of 32
Downloading: bin/nnnat_dll.jar
Cancel
Done
Local intranet

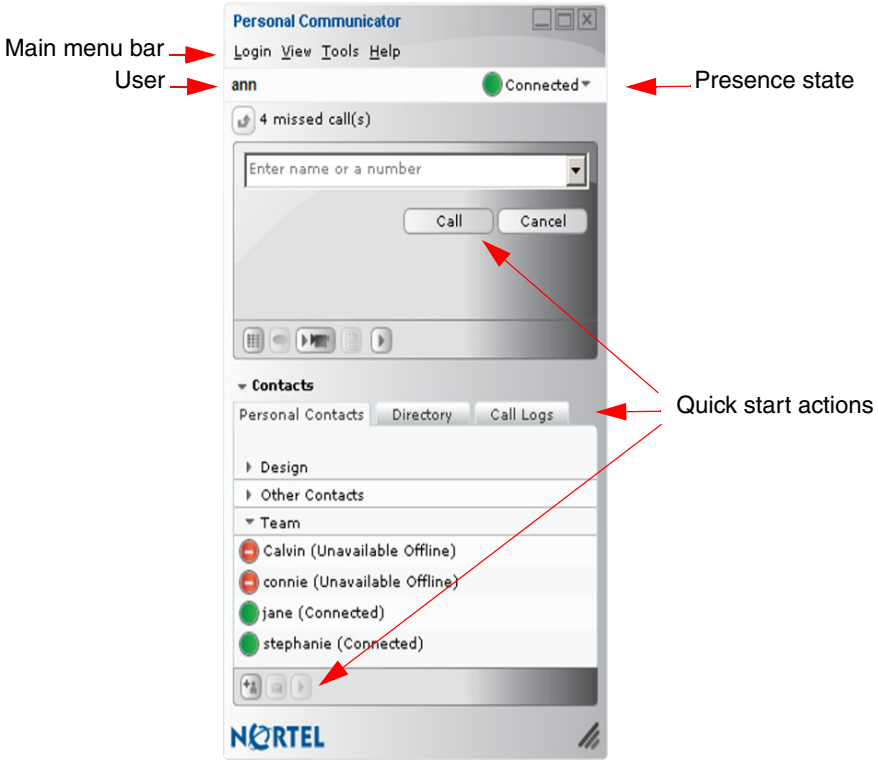
7 Click the **Close this window** button to close the Multimedia Web Client window.

8 If Multimedia Web Client window appears and the files do not start downloading to your computer automatically, then click **Start Multimedia Web Client**.

Navigating the Personal Communicator Client

The following figures show the main window interface that appears when you start up the Personal Communicator Client.

The following figure shows the Standard Personal Communicator Client interface.



The following figure shows the Classic Personal Communicator Client interface.

Tip: Whether you have access to Personal Communicator Client or Multimedia Web Client or both clients, you will see the Personal Communicator Client on the title bar of your Personal Communicator Client windows and main GUI.

Your Personal Communicator must be enabled for voice to use the following

options available on the main page of your client:

- Call, Show dialpad, and Video buttons
- Call Logs panel
- Missed or new calls and voice mail notifications
- Call context menus

Main menu actions

The Personal Communicator Client has a very flexible interface and allows you to perform commands using the menus, the GUI, or hot keys. The following tables list the actions you can perform from the Personal Communicator Client main menu and their corresponding menu location. However, the options available from the main menu are slightly different on the Standard and Classic Personal Communicator Client GUIs.

Tip: Remember, access to some of the menu action items are dependent upon your services and service profiles assigned to you for each service wherever applicable. If a menu item is not available to you, it does not appear on your Personal Communicator Client.

The following table shows the menu options available from the Standard Personal Communicator Client interface.

Menu name	Menu action	Key command
Login	• Login • Logout • Change My Status • Exit	
View	• Personal Contacts • Directory • Call Logs • Assistant Console	• Ctrl+F • Ctrl+D • Ctrl+L • Ctrl+B

Tools	• Voicemail • Personal Agent • Retrieve Parked Call • Preferences	• Ctrl+Shift+V • Ctrl+A • Ctrl+Shift+P • Ctrl+P
Help	• Contents • Software Update (Downloading) • Show Tip of the Day • Capture Logs for Support • About	

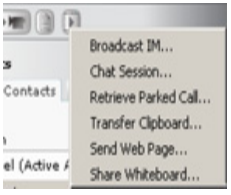
The following table shows the menu options available from the Classic Personal Communicator Client interface.

Menu name	Menu action	Key command
Login	• Login • Logout • Change My Status • Exit	
View	• Directory • Call Logs • Friends • Assistant Console • Quick Start	• Ctrl+D • Ctrl+L • Ctrl+F • Ctrl+B • Ctrl+Q
Tools	• Make Call • Send Instant Message • Send File • Sharing • Start Chat • Preferences • Personal Agent	• Ctrl+M • Ctrl+N • Ctrl+S • Ctrl+G • Ctrl+H • Ctrl+P • Ctrl+A
Help	• Contents • Show Tip of the Day • Capture Logs for Support • Check for Software Update • About	

Main buttons

The following tables show the button available from the Standard and Classic Personal Communicator Client interfaces to easily access the Personal Communicator Client features.

The following table shows the buttons available from the Standard Personal Communicator Client interface.

Standard interface button	Description
	Allows you to make a call.
	Clears the name or number textbox of unprocessed characters.
	Displays the **Dialpad** that allows you to dial the number for the call you wish to make.
	Begins an IM conversation with another party. This can be done from the main window, without an active session running.
	Allows you to • make a video call • start your camera • preview your camera
	Allows you to send a file to a user with whom you are on an active call. This can be done from the main window, without an active session running.
	The More commands button allows you do the following, depending upon the services and service profiles assigned to you for each service wherever applicable: • Send a broadcast IM by launching the **Instant Message** window, which opens your personal directory, allowing you to select multiple users for sending them an instant message simultaneously. • Launch the **Chat Room** window that allows you to create a new chat room or join an existing chat room. • Display the **Retrieve with ID** window to enable you to retrieve a call from a general lot when you enter the call park token information. • During a call, you can transfer clipboard, send a web page, and share whiteboard with the other user. If you are not in a call, these options are hidden.

The following table shows the buttons available from the Classic Personal Communicator Client interface.

Classic interface button	Description
	Displays the Quick Start menu in a tear-away **Quick Start** window attached to the main GUI.
	Displays the **Make A Call** window that allows you to make a call.
	Displays the **Instant Message** window that allows you to address, compose, and send an instant message.
	Displays your address book in a tear-away **Directory** window attached to the main GUI window. Right-clicking on a directory entry displays a shortcut menu with actions that can be performed on the selected entry (for example, call, send file, or send instant message).
	Displays your call logs in a tear-away **Call Logs** window attached to the main GUI window. Right-clicking on a call log entry displays a shortcut menu with actions that can be performed on the selected entry (for example, call, send file, or send instant message).
	Displays your Friends in a tear-away **Friends Online** window attached to the main GUI window. You can see the presence state of all your Friends. Right-clicking on a Friend displays a shortcut menu with actions that can be performed on the selected entry (for example, call, send file, or send instant message).
	If available, it allows one or more assistants to monitor, transfer, or route incoming and outgoing calls for the Assisted user from the Assistant Console. For more information, see *Nortel Adaptive Application Engine – Standalone Overview – Services and Features* (NN48111-112) or *Nortel Communication Server 2000 Adaptive Application Engine Overview – Services and Features* (NN10399-104). Access to Assistant Console depends on whether this service is assigned to you.
	Displays the **Retrieve with ID** window to enable you to retrieve a call from a general lot when you enter the call park token information.
	Displays the **User Preferences** window that allows you to adjust the Personal Communicator Client settings to suit your need.

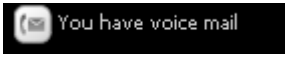
	Displays the **Send File** window that allows you to send one or more files to another user.
	Displays the **Sharing** (if enabled) window that allows you to start a sharing conversation with another user. The Personal Communicator Client allows you to • Send File(s) • Share a Whiteboard • Send Web Page(s) • Transfer Clipboard data
	Launches your system default web browser application and allows you to access call screening and routing functions.
	Launches your system default web browser application and allows you to access the **Personal Agent.**
	Launches the **Chat Room** window that allows you to create a new chat room or join an existing chat room.

Status buttons

The status buttons display important information and provide quick access to the features of the Personal Communicator Client.

The following table shows the status buttons available from the Standard Personal Communicator Client GUI interface.

Standard interface button	Description
	Indicates that you are connected to the network. For more information about presence states, see "Understanding presence" on page 99.
	Indicates that you have missed calls.

Standard interface button	Description
	Indicates that you have voicemail.
	Indicates you have parked calls.

The following table shows the status buttons displayed on the Classic Personal Communicator Client interface.

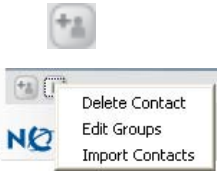
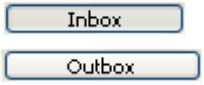
Classic interface button	Description
	Connects or disconnects from the network proxy. Lights up red when you are not connected to the network proxy. Lights up green when you are connected to the network proxy.
	Displays any parked or held calls. Flashes if you have any parked calls or calls on hold. (For Standalone users only)
	Displays your call logs in a tear-away **Call Logs** window attached to the main GUI window. Flashes when you have new calls.
	Activates/Deactivates local Do Not Disturb (DND). Flashes when DND is active. The DND feature is used to block new calls, instant messages, and collaborations. For IM sessions started before users set DND to active, both sides can continue messaging, but others cannot create new IM sessions. The user who sets DND may then need to talk with a user and can start a new IM session where both sides can message each other.
	Calls the voicemail server defined in preferences. Flashes when you have new messages.
	Displays your video preferences. Single-click to display video preferences. Double-click for live video capture window to see the camera and control it. Lights up when video is enabled; dims when video is disabled.

	Displays your Nortel IP Phone preferences. Lights up when a Nortel IP Phone is actively being controlled by the Personal Communicator Client. (For Standalone users only)
	Displays your automatic software updates status. The status button turns • gray when software updates are current • yellow while downloading the automatic software updates • green when automatic software updates are downloaded. Restart the client for updates to take effect. • red when automatic software updates fail to download

Main tabs on Standard Personal Communicator Client interface

The Standard Personal Communicator Client interface provides three tabs to access the following features of the Personal Communicator Client.

Tab	Buttons	Description
Personal Contacts		The **Personal Contacts** tab shows the contacts that you set as friends and shows their presence status.

Tab	Buttons	Description
Directory		The Directory tab shows your personal address book and the global address book. It also allows you to search for a contact from both address books.
		The **Add a contact** button from the **Directory** tab enables you to add a new contact to your directory.
		The **More commands** button from the **Directory** tab • enables you to delete the contact from your personal address book. • opens the Groups window to add new groups or edit existing groups. • opens the Import Contacts window allows you to import contacts from your Microsoft Outlook email application main contact list to your personal address book.
Call Logs		The **Call Logs** tab contains the • **Inbox** button that shows you a list of all your incoming calls • **Outbox** button that shows you a list of all your outgoing calls

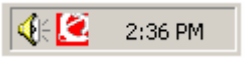
System tray icon

When you start the Personal Communicator Client, the following icon shows up in the system tray.

Double-click on the system tray icon to restore the Personal Communicator Client and bring it to the front of your desktop.

Right-click on the **system tray** icon to access Personal Communicator Client functionality.

When the Personal Communicator Client is offline, the icon in the system tray changes to red.



Tip: When you are not using the Personal Communicator Client, you can click the **X** in the upper-right-hand corner to minimize the window. It will continue to run in the system tray and prompt you when you receive a call or instant message.

Making an emergency call

E911 is supported in North America only. Future development of this feature is required to interoperate with other emergency services outside the US and Canada. The following sections describe making an E911 call.

Personal Communicator Client

When you use the Personal Communicator Client to make an E911 call, you cannot disconnect or initiate any features while on an active call.

The system disables the following features during a 911 call:

• Stop	• Call	• Instant Message
• Send File	• Share	• Hang Up
• Hold	• Mute	• Start Camera
• Audio Quality	• New Call	• Conference
• Transfer		

While the Personal Communicator Client is in an emergency call, you cannot access the Personal Communicator Client main window (or any other) until the client releases the active call dialog box.

During an E911 call, the following Personal Communicator Client features behave as described in the following table:

Feature	Behavior
Do-not-disturb (DND)	The DND feature blocks new calls, instant messages, and collaborations. During the E911 call, this feature transitions the Personal Communicator Client into a mandatory Do-Not-Disturb (DND) mode. This results in rejecting all new inbound requests. Requests subject to rejection include such things as new calls, instant messages, collaborations. After the operator disconnects the call, the Personal Communicator Client disables this DND behavior. For IM sessions started before users set DND to active, both sides can continue messaging, but others cannot create new IM sessions. The user who sets DND may then need to talk with a user and can start a new IM session where both sides can message each other.
Client Collaboration	Active collaboration sessions (those created before an emergency call) will be cancelled if the Personal Communicator Client establishes a call to the emergency operator. Remote participants of the collaboration observe the cancelled collaboration as if the user had clicked **Stop** on the collaboration session window.

Personal Communicator Client Set

When you use a Nortel IP Phone to make an E911 call, the behavior of the set changes during that call to prevent the caller from disconnecting the call or initiating any features while on an active call.

When the system establishes an emergency call, that system modifies the Nortel IP Phone in the areas shown in the following table.

Feature	Behavior
Do-not-disturb (DND)	The DND feature is used to block new calls, instant messages, and collaborations. During the emergency call this feature temporarily enables DND on the device involved in the call. This results in rejecting all new inbound requests. Requests subject to being rejected include: new calls, instant messages and collaborations. After the operator disconnects the call, the device disables this DND behavior. For IM sessions started before users set DND to active, both sides can continue messaging, but others cannot create new IM sessions. The user who sets DND may then need to talk with a user and can start a new IM session where both sides can message each other.
Soft Keys	During the emergency call this feature removes all soft-labels from the LCD display and disables all softkeys. This new behavior prevents the originator from initiating new mid-call features.
New Keys	During an emergency call this feature consumes key press events that would normally allow the call to be disconnected. For instance, pressing the "Release" key or the "onhook" button (on which the handset usually rests) would typically disconnect the call. The system disables the following keys during an E911 call: Hold, Line keys, Mute, Inbox, Service, Release, Soft Keys, Address Book, Outbox, Transfer.
Device Mode	During the emergency call, new behavior is assigned to the Release button and hook-switch button as described in the table below. Bidirectional transitions between handset mode and speakerphone (or headset) mode are allowed. After the emergency session has completed, the Nortel IP Phone returns to the state it was in before the emergency call.

Nortel IP Phone Emergency terminal call control behavior		
Emergency call is made using:	**Action taken: Handset On-hook (assuming handset was offhook)**	**Action taken: Release Key Pressed**
Handset Mode	The device transitions to speakerphone mode. The call is not disconnected.	No action taken. The call continues in handset mode. The call is not disconnected.
Speakerphone Mode	No action taken. The call continues in speakerphone mode. The call is not disconnected.	No action taken. The call continues in speakerphone mode. The call is not disconnected.
Headset Mode	No action taken. The call continues in headset mode. The call is not disconnected (current behavior).	The device transitions to speakerphone mode. The call is not disconnected.

Chapter 2
Multimedia communication

Topics in this section include the following:

- “Making a call” on page 60
- “Receiving a call” on page 65
- “Receiving a new call during a call” on page 68
- “Ending a call” on page 72
- “Declining a call” on page 73
- “Holding a call” on page 73
- “Retrieving a held call” on page 74
- “Parking a call” on page 75
- “Retrieving a parked call” on page 76
- “Transferring a call” on page 77
- “Conference calling” on page 79
- “Sending instant messages” on page 81
- “Sending IM broadcasts” on page 90
- “Using voicemail” on page 91
- “Activating and deactivating the Assistant Services Route” on page 93
- “Assistant Console consultative transfer” on page 95

Making a call

There are multiple ways to initiate a call using the Personal Communicator Client.

Tip: To make voice or video calls, your Personal Communicator client must have voice enabled.

The following table shows the most common ways to make a call.

To call from this interface	You can
Standard Personal Communicator Client interface	• Double click on any **Directory**, **Call Logs**, or **Personal Contacts** tab. Double clicking to make a call is dependent upon your configuration in the Preferences window. • Right-click on any **Directory**, **Call Logs**, or **Personal Contacts** entry, and then select **Call** from the shortcut menu. Remember, right-clicking is a quick way to access extended actions that you can perform on a selected entry. • Manually type a number or an address in the Call area and click the **Dial** button.
Classic Personal Communicator Client interface	• Double click on any **Directory**, **Call Logs**, or **Friends Online** entry. Double clicking to make a call is dependent upon your configuration in the Preferences window. • Right-click on any **Directory**, **Call Logs**, or **Friends Online** entry, and then select **Call** from the shortcut menu. • Use the **Make A Call** button and manually enter a number and address.Remember, right-clicking is a quick way to access extended actions that you can perform on a selected entry.

You can also make a call from your Microsoft Outlook. Select an entry from within Microsoft Outlook and click on the optional Personal Communicator Client Outlook plugin **Call** button.

Tip: You cannot make a call from within your Microsoft Outlook if you have access to Multimedia Web Client only.

Depending on your service provider, voice calls might have to be digit dialed, instead of using the user@domain format to invoke a voice call.

Sending and receiving video

Your Personal Communicator Client enables you to make both voice and video calls. For video calls you must have a web camera for your PC so you can easily transmit video to the other party. A high-bandwidth network connection and fast PC processor are recommended for optimal video performance. If the other party has a camera and subscribes to video service, then you can receive their video transmission as well.

Tip: For more information about how to make or receive video calls, see "Making a call with a dialing prefix" on page 64 and "Receiving a new call during a call" on page 68.

There are pre-defined video configurations for

- Very low bandwidth (Dialup modem)
- Low bandwidth (ISDN, Cable modem, DSL)
- Medium bandwidth (High speed LAN)
- High bandwidth (High speed LAN)
- Very high bandwidth (Very high speed LAN)
- Receive-only video

In addition, the Personal Communicator Client allows you to specify a custom video configuration.

The default setting for video is receive-only video. Before you can send video, you must configure the video settings. For more information on video configuration procedures, see "Setting up video preferences (optional)" on page 188.

Making a call within Microsoft Outlook

There are multiple ways to initiate a call using the Multimedia Office Client:

- Select Multimedia > New Session.
- Click the Session button on the Multimedia toolbar.
- Enter the SIP address or number in the Multimedia toolbar Call entry field and click the Call button.
- Double-click any Friend, Outlook contact, or call log entry and click **Call**.
- Right-click any Outlook contact, Friend, or call log entry and select **Call** from the shortcut menu.

Tip: Right-clicking is a quick way to access extended actions that you can perform on a selected entry.

Making a voice or video call

From your Personal Communicator Client, you can make voice and video calls. Remember, the ability to make video calls depends on whether this service is assigned to you. If you do not have video support, you cannot make video calls.

Tip: To make video calls successfully, ensure that you enable the video option from **Tools, Preferences, Video** tab, which you access from the main menu. For more information, see "Setting up video preferences (optional)" on page 188.

Use the following procedures to make a voice or video call:

- "Initiating a voice or video call using the Standard interface" on page 63
- "Initiating a voice or video call using the Classic interface" on page 63

Initiating a voice or video call using the Standard interface

To initiate a voice or video call using the Standard Personal Communicator Client interface,

1 Enter an address (username, SIP address, or public telephone number) in the Enter a name or a number field just above the Call button. When you enter an address, the five most recent calls (incoming or outgoing) or your personal contacts closest to the address you typed show up in the new Call Edit box.

Tip: When dialing a public telephone number, do not add punctuation to the number. For example, 5556245 is a valid public telephone number, but 972-555-6245 is not. For outside calls from an office system or for long-distance calls, be sure to include any necessary access codes, for example, dial **61**9725556245. Remember, you can also use the **Personal Contacts**, **Directory**, and **Call Logs** tabs to quickly call your contacts.

2 Click **Call** or click **Video, Make Video Call**.

Tip: If you have video, then the video of a remote user shows up inside the main window between the call list and the interaction controls. Different sizes are available to the user: embedded, 100%, 200% or 400%. If you select Embedded, then resizing the main window resizes the video as well. All other values detach the video view and display it in a separate window. Select the values from the drop down menu located at the right of the interaction controls, below the remote video screen. This control is not visible when video is not active. Additionally, you can preview the video feed sent while performing a video call by clicking **Preview My Camera** in the video sub menu of the main window. A window appears and the user can choose to minimize and close the preview.

Initiating a voice or video call using the Classic interface

1 Select **Tools, Make Call** or click **Make A Call** on the Personal Communicator Client main interface. The **Make A Call** address window appears.

2 Enter a number in the **Make Call to** field.
Depending on your service provider, you might be able to enter a username, SIP address, or public telephone number.

3 From the **Make A Call** window, you can access your personal address book as well as a redial list of the last five incoming and outgoing calls. Click **Recent** and/or **Directory** to access these extra address resources.

Tip: Double-click on a personal address book entry to immediately make a call to that entry.

4 Enter or select an optional call subject in the **Subject** drop-down list.

5 Click either the **Make Phone Call** or **Make Video Call** button to make a call to the address you have entered.

Making a call with a dialing prefix

You can set up dialing prefixes from the **Tools, Preferences, Calls** window to make calls. For more information, see "Setting calls preferences" on page 217.

When you set up dialing prefixes and make a call to what appears to be a PSTN number, the **Choose A Dialing Prefix** window appears.

1 Select the number from the Dialing Prefix drop-down list. Note that the default dialing prefix is initially selected in the drop-down list.

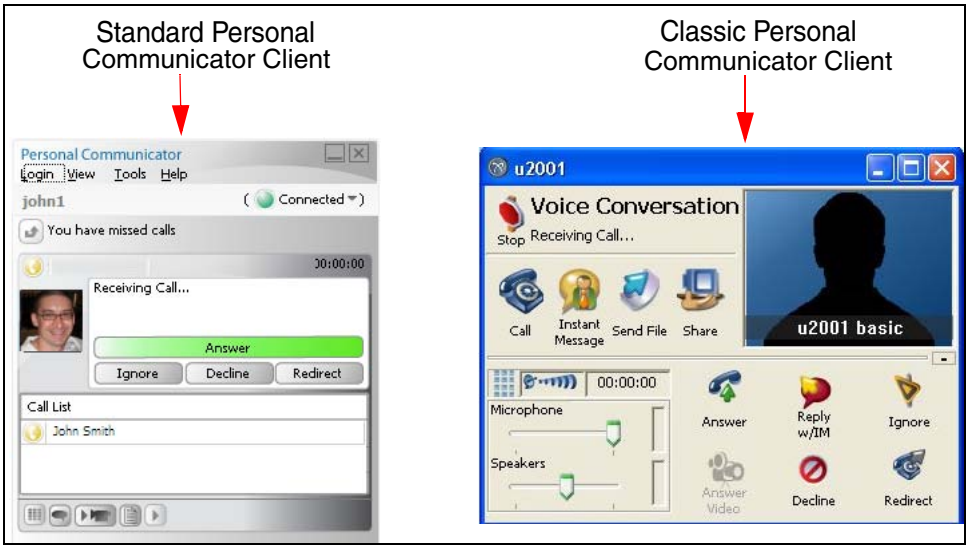
2 Click **OK**.

3 Click **None** or **Cancel** to use no prefixes for making a call.

Receiving a call

When the Personal Communicator Client receives an incoming call, the call appears either in a separate window or in an expanded area within your client depending upon your interface.

In this interface	The incoming call appears in
Standard Personal Communicator Client	the expanded Call List area of the client
Classic Personal Communicator Client	a separate Conversation window



Tip: In the Standard interface, the Call List area expands only when you receive or make a call, showing the called or calling party. If no call is in progress, the Call List area is hidden.

You also receive a notification of an incoming call from the Personal Communicator Client system tray. When the window pops up in the system tray area, you can either answer or ignore the call.

To turn on or off the system tray notification, see “Specifying call pop-up behavior” on page 218.The following table shows the button and status information that you see in the Receiving Call **Conversation** window.

Receiving Call Conversation window	Description	Available in this interface
Name on the title bar	The name of the calling party appears in the title bar. Select the name that will appear in the window by using the following order of precedence: • If the calling party is defined in your personal address book, then the user’s **nickname** appears. • If the user has provided a **display name** and the user is not in your personal address book, then their **display name** appears. • If the calling party is not in your personal address book, and no **display name** is provided, then the user’s **username** appears.	Standard and Classic Personal Communicator Client
Stop	Closes the Conversation window and ends the call.	Classic Personal Communicator Client
Subject	If the calling party provides a subject for the call, the call subject appears in the Subject area.	Classic Personal Communicator Client
Call	Until the call is answered, the **Call** button has no action. Once a call is answered, the **Call** button closes or reopens the call control pane. It also initiates a call to the other party.	Classic Personal Communicator Client
Picture	If the caller provides a network calling picture ID, a photo of the caller appears.	Standard and Classic Personal Communicator Client
Answer	The call is answered and voice is started.	Standard and Classic Personal Communicator Client
Answer Video	The call is answered and voice (and, if negotiated, video) is started. This button is enabled if you have a camera and the other party has a camera installed on its Personal Communicator Client.	Classic Personal Communicator Client
Decline	When selected, this button informs the caller that the call has been declined and the Conversation window closes. You have the option of declining with or without a reason.	Standard and Classic Personal Communicator Client

Receiving Call Conversation window	Description	Available in this interface
Ignore	The conversation window closes. You can configure whether or not the caller is informed that the call has been ignored using **Tools, Preferences, Miscellaneous**.	Standard and Classic Personal Communicator Client
Redirect	A Redirect Call window appears and you can select or enter an address where the call will be redirected. After selecting or manually entering a redirect address, the Conversation window closes.	Standard and Classic Personal Communicator Client
Reply w/IM (if IM is enabled)	When selected, the Conversation window expands to show the instant messaging control pane where you can enter a message to send to the caller. The incoming call is not affected and can still be handled through one of the other Conversation window call-handling buttons.	Classic Personal Communicator Client
Instant Message	In the Standard interface, a separate window opens where you can enter a message to the caller. In the Classic interface, the Conversation window expands to show the instant messaging control pane where you can enter a message to send to the caller. The incoming call is not affected and can still be handled through one of the other Conversation window call-handling buttons.	Standard and Classic Personal Communicator Client
Send File	In the Standard interface, you can select the Send File button under the Call List area. In the Classic interface, the Conversation windows expands to show the share control pane. A file chooser dialog window also opens to allow you to select a file to send to the caller.	Standard and Classic Personal Communicator Client

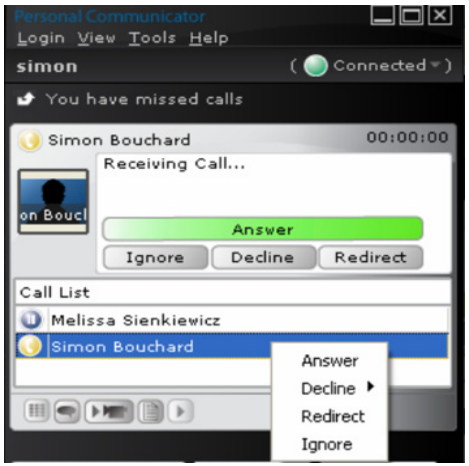
Receiving Call Conversation window	Description	Available in this interface
More	Click this button to access the Personal Communicator Client sharing functions: • **Broadcast IM** to enable you to send an instant message to multiple users simultaneously. • **Chat Session** to enable you to create a new chat room or join an existing chat room. • **Retrieve with ID** to enable you to retrieve a call from a general lot when you enter the call park token information. • **Transfer Clipboard** to send the contents of your system clipboard to the other user. • **Send Web Page** to send web pages for viewing on the other user's system. • **Share Whiteboard** to share a common whiteboard with the other user.	Standard Personal Communicator Client
Share (if enabled)	The Conversation window expands to show the share control pane. From there you can access the Personal Communicator Client sharing tools: • **Send File** to send files to the other user. • **Share Whiteboard** to share a common whiteboard with the other user. • **Transfer Clipboard** to send the contents of your system clipboard to the other user. • **Send Web Page** to send web pages for viewing on the other user's system.	Classic Personal Communicator Client

Receiving a new call during a call

When you are on a call, and you receive another call, right click the mouse button on the incoming call in the Call List area to:

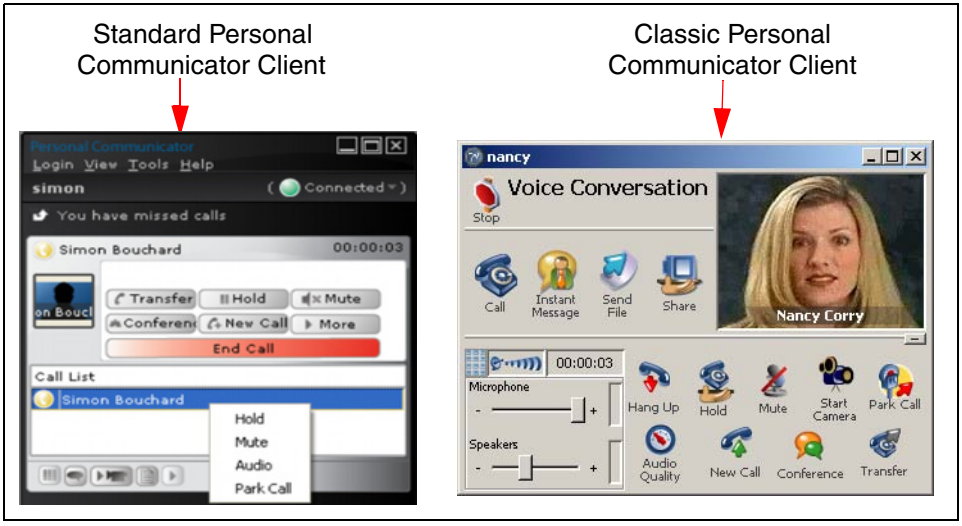
- answer the call,
- decline the call (with or without reason),
- redirect the call, or

- ignore the call



Answering a voice or video call

When you receive a call, you can answer it either as a voice call or a video call. To answer an incoming call, click **Answer** in the Call area. The window changes to include active call controls.



Tip: In the Standard interface, the Call List area expands only when you receive or make a call, showing the called or calling party. If no call is in progress, the Call List area is hidden.

The following table shows the buttons and status information available in an active call window.

Conversation window	Description	Available in this interface
Transfer	Displays the following buttons: • Announce button calls the user in the edit box to announce the transfer • Transfer button directly transfers to the user in the edit box. • Voice Mail button transfers the call to voice mail. • Cancel button returns to the active call view Transfers the conversation to another user. The transfer can be unattended (direct transfer) or attended (consultative transfer).	Standard and Classic Personal Communicator Client
Hold Retrieve	Places the conversation on hold or retrieves the held conversation. In the Standard interface, the **Hold** button caption changes to **Unhold** and is used to release the held call. In the Classic interface, the **Hold** button flashes when the conversation is actively held.	Standard and Classic Personal Communicator Client
Mute	Mutes the microphone and stops video for the conversation or un-mutes the muted microphone and restores video for the conversation. In the Standard interface, the **Mute** button caption changes to **Unmute** and is used to restore audio to the call. In the Classic interface, the Mute button flashes when the conversation is actively muted.	Standard and Classic Personal Communicator Client

Conversation window	Description	Available in this interface
Conference	Places the conversation on hold (if it is not already held) and opens a Make A Call window that allows you to originate another call. Once that new call is answered, the Conference button becomes a Join button that allows you to join the new call and the held call into a single conference call.	Standard and Classic Personal Communicator Client
New Call	Places the conversation on hold (if it is not already held) and opens a new Make A Call window that allows you to originate another call.	Standard and Classic Personal Communicator Client
Start Camera	Attempts to add video to the existing voice conversation.	Standard and Classic Personal Communicator Client
More commands • Audio Quality • Park Call	Provides the following buttons: • Audio Quality: displays what type of voice CODEC is actively being used for the call (low speed or high speed). When selected, the Personal Communicator Client attempts to switch CODECs for the call (high speed to low speed, or low speed to high speed). • Park Call: Parks or holds a call in a general lot so another user can retrieve it with a call park token or parks a call for a specific user for retrieval.	Standard Personal Communicator Client
Audio Quality Park Call		Classic Personal Communicator Client
End Call	Closes the Conversation window and ends the call.	Standard Personal Communicator Client
Hang up		Classic Personal Communicator Client

Disabling call waiting

If you do not wish to receive any incoming calls while you are on an active call, you can have your system administrator activate the call-waiting disable feature. When this feature is enabled, you do not receive any incoming call pop-up windows, allowing you to focus on your current call. The system logs the rejected incoming calls into your incoming call logs as missed calls. Call Waiting Disable applies to all endpoints, not just the PCC.

Activating the call-waiting disable feature does not affect instant messaging, collaboration capabilities, or making outgoing calls.

When the system administrator activates the call waiting disable feature, the caller receives one of the following:

- a busy tone
- your voicemail with the “user busy” greeting

  The ability to use the call-waiting disable feature depends on whether this service is assigned to you. If you do not have support this feature, then you cannot use the call-waiting disable feature.

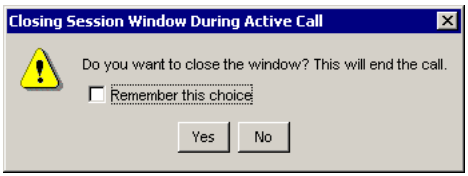
Ending a call

To end a call, select the following option depending upon you Personal Communicator Client interface.

In this interface	Click
Standard Personal Communicator Client	**End Call**
Classic Personal Communicator Client	**Hang up**

Ending a voice conversation does not necessarily close the **Conversation** window. If there are other active conversations with the user, the window stays open (for example, if the instant messaging control pane is open, the **Conversation** window remains open, even after the voice conversation has ended).

In the Classic interface, if you try to close the Conversation window during an active call, the Closing Session Window During Active Call window appears.


Closing Session Window During Active Call
Do you want to close the window? This will end the call.
Remember this choice
Yes
No

Select	To
Yes	end the call.
No	remain on the call.

Declining a call

You can decline a call using the Decline option. When a call is declined, with or without reason, the calling party hears a tone indicating that the call has been declined. When a decline reason is given, depending on the capabilities of the service provider and the calling party's phone, the reason is presented to the calling party.

To decline a call,

1 Click **Decline** in the incoming call window.

2 Select **Decline/Decline with reason**.
The called party window is closed, but the calling party's window remains open.

Holding a call

To put an active voice conversation call on hold,

1 Make a voice call or answer an incoming voice call.

2 Click **Hold**.

In this interface	The **Hold** button
Standard Personal Communicator Client	changes to **Unhold**
Classic Personal Communicator Client	starts flashing

The call is now on hold, and the caller can hear music or a tone if you have the Music on hold service.

The ability to play music or a tone for calls that are placed on hold in the network depends on whether this service is assigned to you. If the Music on Hold service is not assigned to you, then the calls you place on hold cannot hear music.

Tip: While the call is on hold, you can make and answer other calls.

Retrieving a held call

To retrieve a call on hold, select one of the following options.

In this interface	Click
Standard Personal Communicator Client	the **Unhold** button to retrieve a call. The button caption changes back to **Hold**.
Classic Personal Communicator Client	the flashing **Hold** button. The **Hold** button stops flashing.

Sometimes, you may not be able to retrieve a call. For example, the caller you put on hold can place you on hold as well.

Tip: If you retrieve a held call while on another call, the client automatically places the active call on hold.

Parking a call

Tip: This procedure is specific to Standalone users.

The **Park Call** button allows you to place a call on hold so that someone else can retrieve it. You can have the call returned to you if it is not picked up after a specified amount of time. This service must be assigned to you.

You can park a call in a general lot for general retrieval, or park a call for a specific user.

To park a call

1. Make a call or answer an incoming call.
2. Select the option to park the call.

In this interface	Click
Standard Personal Communicator Client	**More, Park Call.**
Classic Personal Communicator Client	**Park Call**.

3. From the Park Call window, select **Park in general lot** if you wish to hold the call for any user in the domain to retrieve it.
4. Click **OK**.

   The Call Parked window appears providing you with a call park token.
5. From the Park Call window, select **Park against a user** if you wish to hold the call for a specific user.
6. Click **OK**.

   The user you designate to retrieve the parked call receives a Parked Call window on the Personal Communicator Client, indicating that the user has a parked call. The window identifies the name and picture (if available) of the caller.

Retrieving a parked call

Tip: This procedure is specific to Standalone users.

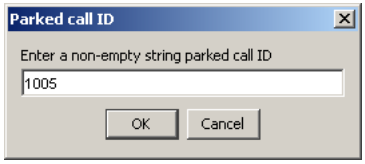
When you park a call in a general lot, you receive a call park token. Forward the call park token to the users who may retrieve this call from the general lot.

To retrieve a call from a general lot,

1 Select the option to retrieve the call.

In this interface	Click
Standard Personal Communicator Client	**More, Retrieve with ID**
Classic Personal Communicator Client	**Retrieve with ID**

2 In the Parked call ID window, enter the call park token of the parked call.



3 Click **OK.**

You get connected with the call.

Automatically retrieving a parked call

If you set the auto-retrieve function in the Personal Agent, you can automatically retrieve your parked call from the Personal Communicator Client. With this setting, if a parked call is not retrieved from the general lot or by a specific user within a specified time period, then the call automatically routes back to you since you initially parked this call. Enable the auto-retrieve function in the Personal Agent through **Preferences, Services, Call Park**. For more information, see *Nortel Adaptive Application Engine Personal Agent User Guide* (NN48111-119).

Tip: If you enable the auto-retrieve function in the Personal Agent, you do not need the call park token information to retrieve a call.

The ability to automatically retrieve a parked call that was not answered within a specified amount of time depends on whether this service is assigned to you.

Transferring a call

You can transfer an active call without talking to the person you are transferring the call to (direct transfer), or you can consult with the person who will receive your transferred call (consultative transfer).

Direct transfer

To perform a direct transfer of an active call,

1. Click the **Transfer** button for the conversation you wish to transfer. The **Transfer** window appears.
2. Enter a transfer address, such as a telephone number or SIP address.
3. Click **Transfer**.

   The Personal Communicator Client transfers the call to the named destination, closes the window, and disconnects the call.

Consultative transfer

The consultative transfer feature must be enabled by your administrator.

To transfer an active call and speak with the party you are transferring to,

1. Click the **Transfer** button for the conversation you wish to transfer.

   The **Transfer** window appears.

2. Enter a transfer address, such as a telephone number or SIP address.

3. Click **Announce**.

   The Personal Communicator Client initiates a new call to the transfer destination client and places the call between you and the transferee on hold.

If you use this interface	Then
Standard Personal Communicator Client	**Complete Transfer** button appears in the Call area.
Classic Personal Communicator Client	**Complete Transfer** button in the Conversation window flashes

4. After talking to the transfer destination, select the option to complete the transfer.

In this interface	Press the
Standard Personal Communicator Client	**Complete transfer** button.
Classic Personal Communicator Client	flashing **Complete transfer** button

   The transferee and the transfer destination are connected in a call and the transfer is complete. You are dropped from the calls with both transferee and transfer destination.

Conference calling

You can use the Personal Communicator Client to set up network-hosted audio conference calls. The maximum number of parties that you can join together in a network-hosted audio conference depends on whether this service is assigned to you.

As a Standalone Converged Desktop user, you cannot initiate an Ad Hoc audio conference call, that is, create a conference at random by joining multiple calls together into one conference call. However, users on other access clients can include a Converged Desktop user into such a conference call. As a Converged Desktop user, you can set up a Meet Me audio conference call.

Tip: To make conference calls, your Personal Communicator Client must have voice enabled.

Creating a conference

You can create a conference at random by joining multiple calls together into one conference call.

Remember, you have a limited number of conference ports for people to be in your conference call. The maximum number of conference ports is defined by your services. In a conference you take up one port, so the maximum number of people you can join into a single audio conference is the conference port limit minus one.

Also, remember that video is not available during conference calls.

Creating a conference using the Standard interface

To set up a conference call using the Standard Personal Communicator Client,

1. Make a call or answer an incoming call.
2. Press the **Conference** button.
3. Select the parties you want to add to the conference.

4 Repeat this process up to the conference port limit defined by your services.

5 Press **Join to Conference** to add all parties into the conference.

Creating a conference using the Classic interface

1 Make a call or answer an incoming call.

2 Place that party on hold.

3 Repeat this process up to the conference port limit defined by your services.

4 Unhold the parties and click the **Join** button in any one of the **Conversation** windows.

The Personal Communicator Client initiates a new call to the network conference server, requesting the appropriate number of conference ports.

Once the Personal Communicator Client has successfully contacted the network conference server, all the held calls are transferred to the network conference server. As each party joins the conference, the **Conversation** window for that call closes.

Limitations of the Join button

In a conference call, you cannot access automated menu options from your dialpad buttons for certain services after you click the **Join** button.

For example, from a conference call, if you decide to call the support line for help, then do the following:

1 Click **Hold** to place your existing conference call on hold.

2 Go through the entire automated menu options using your dialpad buttons until you get the support person on the phone.

3 Click **Join** to enable other users in the conference call to hear the support person.

Warning: If you click **Join** before reaching the support person, the dialpad buttons on your Personal Communicator Client are disabled. Consequently, you cannot click any buttons to access the menu options for reaching the support person for help.

Leaving a conference

Any user can depart from a conference call at any time.

In this interface	Click
Standard Personal Communicator Client	**End Call** button
Classic Personal Communicator Client	**Hang Up** button

The network conference server continues hosting the conference call until only one party remains, at which point it ends the call.

Sending instant messages

Instant messaging allows you to send and receive text notes among one or more recipients, even while you are engaged in an active call. The ability to send an IM depends on whether this service is assigned to you.

From your Personal Communicator Client, you can send instant messages and check the presence of users on external communities, such as Yahoo, Google, AOL, MSN, and Jabber. However, you user must have valid user names for each community you wish to communicate with. For example, in order to exchange instant messages with a Yahoo user, you must have a valid Yahoo identification. Ensure that you create an ID as required for each community. For more information, see "Adding a personal address book entry" on page 118.

Encryption of instant messaging is system dependent and is subject to the export control regulations of your country.

The following table shows how you can send an instant message (IM) in any of the following ways.

When you send an IM	By selecting the	Then this window appears	In this interface
from the Personal Communicator Client main tool bar	**Instant Message** button	an Instant Message address window appears for you to select the recipient(s) and enter the message.	Classic Personal Communicator Client
from the Personal Communicator Client main menu	**Tools, Send Instant Message** menu item	an Instant Message address window appears for you to select recipient(s) and enter the message.	Classic Personal Communicator Client
from the Conversation window of an active call	**Instant Message** button	an IM Conversation window appears in the Standard interface for text messaging to the other user on the call. the Conversation window expands in the Classic interface to show the instant message control pane for you to send a text message to the user on the call.	Standard and Classic Personal Communicator Client
from the Conversation window of an incoming call	**Instant Message** button	an IM Conversation window appears in the Standard interface for text messaging to the originator. the Conversation window expands in the Classic interface to show the instant message control pane for you to send a text message to the originator of the call.	Standard and Classic Personal Communicator Client
from the Call area of an incoming call	**Reply w/IM** button	the Conversation window expands to show the instant message control pane for you to send a text message to the originator of the call.	Classic Personal Communicator Client
by right-clicking any **Personal Contacts, Directory, or Call Logs** entry	**Send Instant Message** button	an IM Conversation window appears for you to send a text message to the address of the selected entry.	Standard Personal Communicator Client
by right-clicking on any **Directory**, **Call Logs**, or **Friends Online** entry	**Send Instant Message** button	an IM Conversation window appears for you to send a text message to the address of the selected entry.	Classic Personal Communicator Client

Tip: Bring up the **Instant Message** address window by pressing **<CTRL-N>** in the classic Personal Communicator Client main GUI.

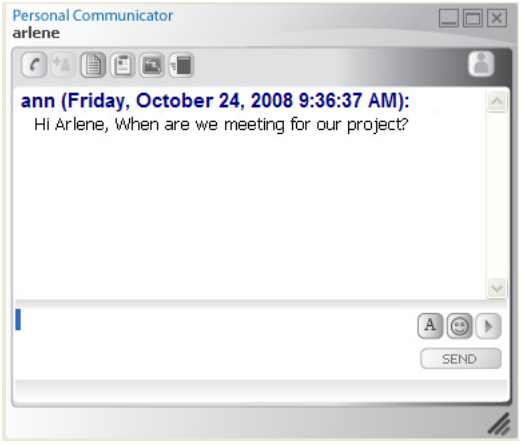
Sending an instant message from the Standard interface

To initiate an instant message conversation from the Standard Personal Communicator Client interface,

1. Enter an address (username, or SIP address) in the **Enter a name or a number** field just above the **Dial** button field.
2. Click the **Instant Message** button. The Instant Message window appears.

Tip: Remember, you can also select a contact from the **Personal Contact**, **Directory**, or **Call Logs** button. When initiating an instant message directly from one of these buttons, you do not have to enter the instant message recipient address, just right click and select **Send Instant Message**.

3. Type your message in the instant message control pane.
4. Press **Enter** on your keyboard, or click **SEND** in the instant messaging control pane.

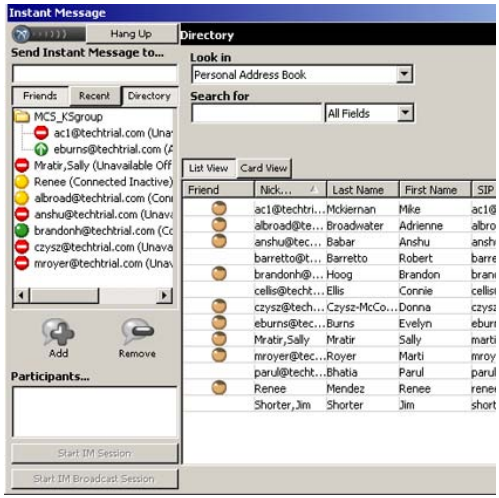


Sending an instant message from the Classic interface

To initiate an instant message conversation from the Classic Personal Communicator Client interface,

1 Select **Tools, Send Instant Message** or click **Instant Message** on the main GUI.

The **Instant Message** address window appears.



2 Enter an address (username, or SIP address) in the **Send Instant Message to** field. The **Instant Message** address window also includes access to your personal address book, your friends, and a list of most recent addresses you've had instant message conversations with. Click **Friends, Recent,** and/or **Directory** to access these extra address resources.

3 Click **Add** to place the address into the **Participants** list.

The Personal Communicator Client allows you to start multiple instant message conversations at one time. If you want to start multiple instant message conversations at one time, repeat the previous two steps for each address you wish to start an instant message conversation with.

4 Click **Start IM Session** to bring up an **IM Conversation** window. A presence icon appears if the person is a Friend. If you move your mouse pointer over

the picture, a tooltip appears with complete status, for example, “Nancy (Active Available).”

Tip: When initiating an instant message directly from a **Directory** entry, **Friends** entry, **Call Logs** entry, or a Conversation window, you do not have to enter the instant message recipient address using the Instant Message address window.

5 Type your message in the instant message control pane. If you want, you may format the text by using the font control button.

6 Press **`Enter`** on your keyboard, or click **SEND** in the instant messaging control pane.

Tip: Remember, you cannot chat with multiple contacts simultaneously from an external IM community. For example, if you are exchanging instant messages with your Yahoo contact, then you cannot exchange instant messages with your AOL contact.

Replying to an instant message

When you receive an instant message, it appears in an IM conversation window from the sender. To reply to the instant message,

1 Type your message in the instant message control pane. If you want, format the text by using the font button.

2 Press **Enter** on your keyboard, or click **SEND** in the instant messaging control pane.

Your message appears in an IM Conversation window of the person who sent the instant message.

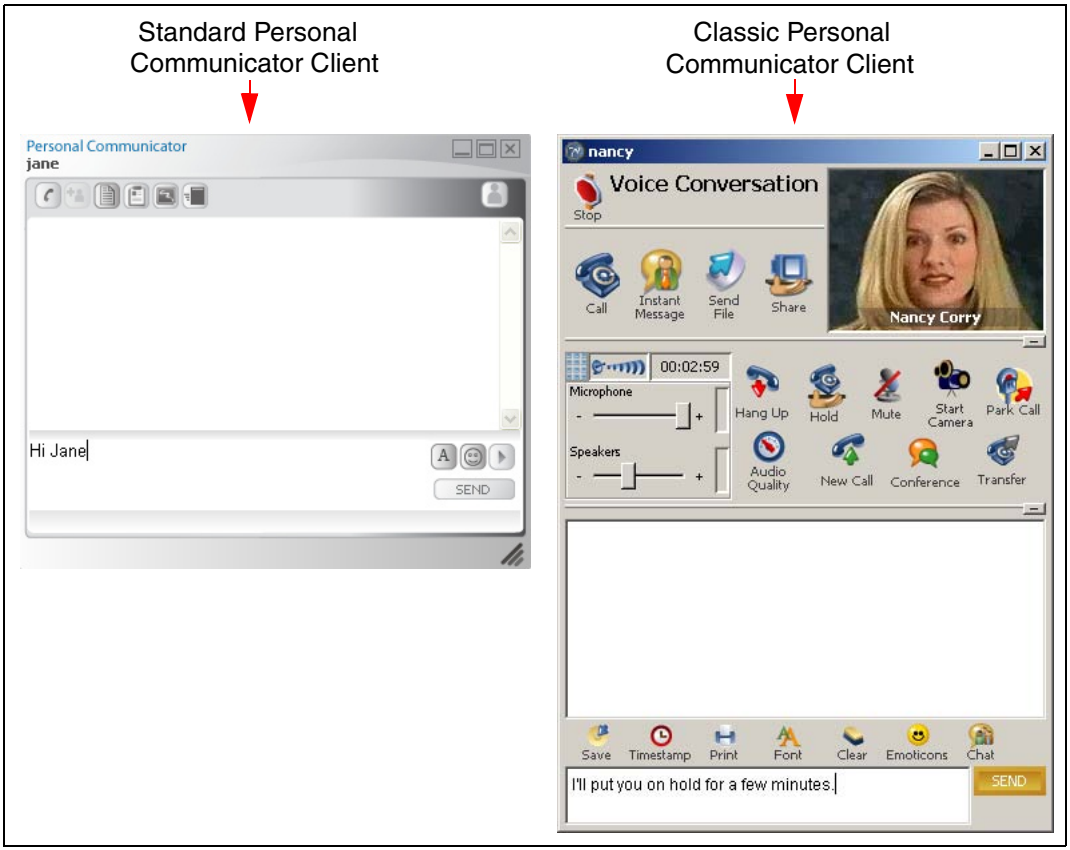
Tip: Remember, you cannot chat with multiple contacts simultaneously from an external IM community. For example, if you are exchanging instant messages with your Yahoo contact, then you cannot exchange instant messages with your AOL contact.

Sending an instant message during a call

To send an instant message during an active conversation,

1 Select the **Instant Message** button.

In this interface	When you click	Then
Standard Personal Communicator Client	**Instant Message** button under the Call List area.	a separate instant messaging window appears.
Classic Personal Communicator Client	Personal Communicator Client button on the Conversation window for the call you are on.	the Conversation window expands to include the instant message control panel.



2 Type your message in the instant message control pane. If you want, format the text by using the font button.

3 Press `Enter` on your keyboard, or click **SEND** in the instant messaging control pane.

Querying the presence of a user in an instant message conversation window

In an IM conversation window, you can see the Presence status of another user if the other user is in your personal address book. Otherwise, the user's Presence status is indicated by a question mark.

To find the address of a user from the Global Address Book and query the user's Presence status from the IM conversation window,

1 Click **Directory** from your Personal Communicator Client main window.

In this interface	Click
Standard Personal Communicator Client	the **Directory** tab
Classic Personal Communicator Client	the **Directory** icon on the main toolbar

Note that the Directory display pane defaults to the Personal Address Book.

2 Select the Global Address Book from the drop-down list.

3 Enter the name of the user with whom you wish to start an IM conversation. The name appears in the Directory display pane.

4 Right click on the name and click **Send Instant Message**.
An IM window appears, showing the name of the user and a question mark for the user's Presence status.

5 Click the **Presence** icon.
The icon changes to the user's current Presence status.

Clearing your instant messages history

When you exchange instant messages with another user, all your conversations are saved and appear in the IM display window during your subsequent conversations. You can save, print, or clear these conversations from the window. Additionally, you can view the time and date of your conversations with a user.

To clear your instant message history in the Standard interface,

1. Select a user from the Personal Contacts tab and right click to select **Send Instant Message**.
   The instant message conversation window of the user you selected opens.
2. Click the **More commands** button. It is the arrow button at the bottom right of your IM window.
   Options appear, including Clear.
3. Click **Clear**.
   The Clear Instant Messages window opens.
4. Click OK.
   Your instant message history with the current user is cleared.

To clear your instant message history in the Classic interface,

1. Select a user from the Friends Online window and right click to select **Send Instant Message**.
   The IM Conversation window of the user you selected opens.
2. Click the **Clear** icon on the instant message control pane.
   The Clear Instant Messages window opens.
3. Click OK.
   Your instant message history with the current user is cleared.

Sending IM broadcasts

Sending an IM broadcast enables you to send an instant message to multiple users simultaneously. The ability to send an IM broadcast depends on whether this service is assigned to you.

To send an IM broadcast,

1 Select one of the buttons to open the Instant Message window.

In this interface	Select
Standard Personal Communicator Client	**More, Broadcast IM** under the Call List area.
Classic Personal Communicator Client	**Tools, Send Instant Message** or the **Instant Message** button on the main GUI.

2 In the **Instant Message** window, select an address (username, or SIP address).

In this interface	Select an address from
Standard Personal Communicator Client	the **Personal Contacts**, **History**, and/or **Directory** tabs
Classic Personal Communicator Client	**Friends**, **Recent**, and/or **Directory** buttons

3 Click **Add** to place the address into the **Participants** field.

Remember, the **Start IM Broadcast Session** button is disabled until you add at least two addresses in the **Participants** field.

4 Click **Start IM Broadcast Session**.

The IM Broadcast window appears.

5 Type your message in the instant message control pane. If you want, format the text by using the font button.

6 Press **Enter** on your keyboard.

Tip: If you are using the Classic Personal Communicator Client interface, you can also click the **SEND** button in the instant messaging control pane.

The IM broadcast you sent appears on your IM Broadcast window.

Tip: Remember, the IM Broadcast window is only capable of sending messages to multiple users simultaneously. It does not receive any messages.

If one of your contacts is offline, a window appears letting you know that your IM broadcast failed to reach this person.

Using voicemail

The Personal Communicator Client gives you point-and-select access to your voicemail service from your organization or network provider. Whether or not you can access the integrated voicemail commands from your Personal Communicator Client depends on whether this service is assigned to you. Contact your service provider for details on obtaining network-based voicemail and ensuring that your unanswered calls go to your network voicemail box.

See "Setting up network-based voicemail access (optional)" on page 208 for more information on configuring the Personal Communicator Client for use with a voicemail system.

Tip: Before accessing your voicemail through the Personal Communicator Client for the first time, configure the Personal Communicator Client to contact your voicemail system.

The ability to use Unified Communications services depends on whether this service is assigned to you.

Tip: To use the voicemail service, your Personal Communicator Client must have voice enabled.

Message Waiting Indicator (MWI)

You can have access to your network-based voicemail server only if this service is assigned to you. If you have support for this service, then, when a user leaves you a voicemail message, the Personal Communicator Client alerts you that you have voicemail. The voicemail alert you receive depends on your Personal Communicator Client user interface.

If you use this interface	Then
Standard Personal Communicator Client	the **voicemail** button appears in the Call area, with the message, “You have voice mail.”
Classic Personal Communicator Client	the **voicemail** status button appears on the main GUI indicating you have voicemail.

With the Multimedia PC Client with Converged Desktop service, you can use your existing voicemail system to get your voice messages. However, you will not be able to take advantage of the **voicemail** status button on the main GUI. If you host your voicemail off of the network-based voicemail system, the **voicemail** status button flashes and alerts you about your new voicemail messages. Accessing the network-based voicemail server depends on whether this service is assigned to you.

Accessing your voicemail box

Before using the **voicemail** button to access your voicemail server, configure the Personal Communicator Client, providing the command digits for the various voicemail commands. See “Setting up network-based voicemail access (optional)” on page 208 for information about configuring the Personal Communicator Client voicemail command buttons.

To access your voicemail box, click the **voicemail** status button on the Personal Communicator Client main window. The Personal Communicator Client makes a call to your voicemail server. A Conversation window and extended call control pane appears that enables you to interact easily with the voicemail system.

Using voicemail functions

To use the voicemail control pane functions, click the command buttons on the voicemail control pane for the function you wish to perform on the voicemail system. You can also access the integrated dial pad to manually enter commands for the voicemail system.

To access the integrated dial pad,

1. Click **keypad** in the call control pane.

   The Personal Communicator Client displays a dial pad so you can enter digits to send to the voicemail server.

2. Click the digit(s) you want to send to the voicemail server. You can also use your keyboard to type in the digits to send.

Activating and deactivating the Assistant Services Route

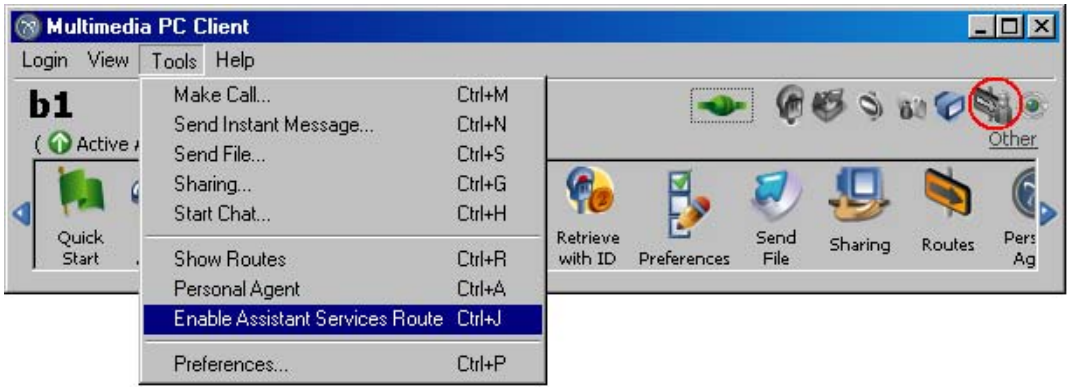
Tip: This procedure is specific to Standalone users.

Assisted and Assistant users can activate the Assistant Services Route from the Personal Communicator Client.

The Assistant Support service must be assigned to you, and the Assisted Services Route must already be selected from the Personal Agent as described in *Nortel Adaptive Application Engine Personal Agent User Guide* (NN48111-119).

Assisted user

To enable the Assisted Services Route as an Assisted user, select **Tools, Enable Assistant Services Route** or the button on the main GUI. The tooltip for the button displays the text “Enable Default Assistant Services Route” if the button is colored and “Disable Default Assistant Services Route” if the button is dimmed.



If default route is not selected, activating the Assistant Services Route returns an error indicating that default route is not selected for Assistant Service.

Assistant user

To enable the Assisted Services Route as an Assistant user,

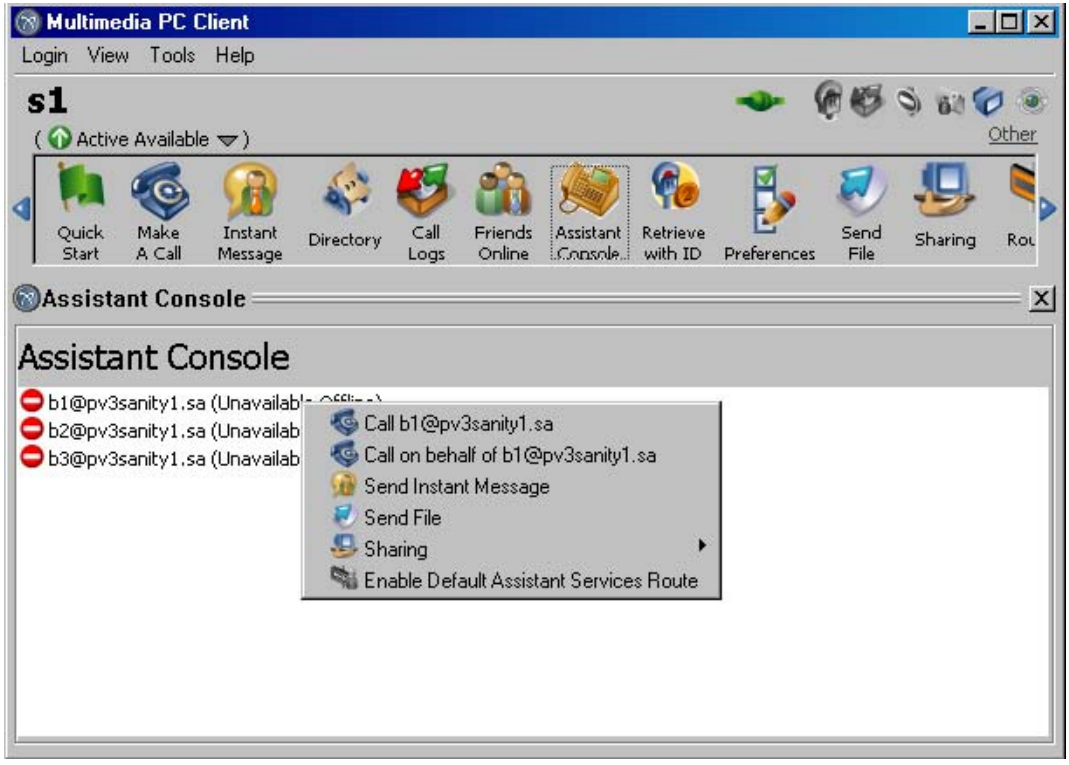
1. Select the **Assistant Console** button from the main GUI.

   The assistant console shows a list of assisted users.

2. Right-click on an assisted user to display a pop-up menu.

3. Select **Enable Default Assistant Services Route** to activate the Assistant Services Route.

The menu option displays **Disable Default Assistant Services Route** if the route is already enabled.



Assistant Console consultative transfer

Tip: This procedure is specific to Standalone users.

If you are subscribed to Assistant Console service, you have the option of completing or joining a call that you transfer. You can also transfer a caller to an Assisted user's voicemail. The transfer destination must be logged into the Personal Communicator Client or a Nortel IP Phone.

Consultative transfer and complete or join call

To transfer an active call, announce the caller, and either join or complete the call,

1. Click **Transfer** in the pane for the conversation you wish to transfer.

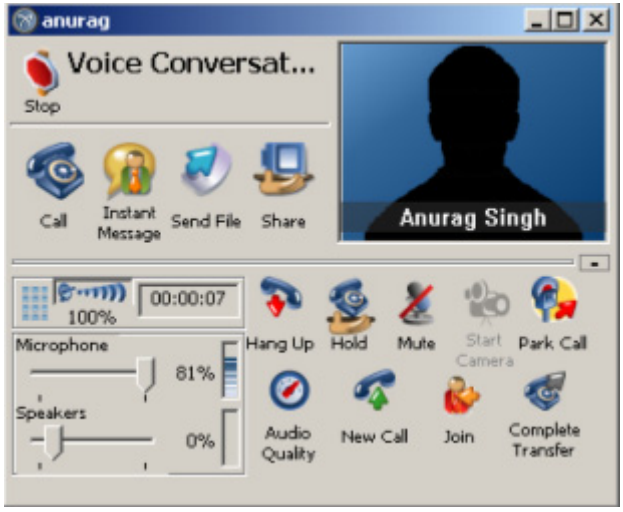
   The **Transfer Call** window appears.

2. Enter a transfer address, such as a telephone number or SIP address, select a **Recent** or **Directory** entry, or select an Assisted user from the drop-down list.

3. Click **Announce Caller** in the **Transfer Call** window.

The classic call is put on hold and the Personal Communicator Client initiates a new call to the transfer destination.

4 To join the call after talking to the Assisted user, click **Join** in the Conversation window to initiate the transfer.



A 3-way conference starts between the Assisted user, Assistant, and the caller being transferred.

5 To complete the call without joining after talking to the Assisted user, click **Complete Transfer** in the Conversation window to initiate the transfer.

A call is established only between the Assisted user and the caller being transferred.

Transferring a call to Assisted user voicemail

This procedure requires that Assisted user has voicemail and Unified Communications services assigned.

To announce an active call and transfer the call to an Assisted user's voicemail,

1 From the Assistant Console, select the Assisted user and establish a call.

The call to be transferred is put on hold and the Assistant client calls the Assisted user. A new call window opens in the Assistant Personal Communicator Client.

2 Talk to the Assisted user.

The Assisted user declines to speak to the user to be transferred and ends the call.

3 Click **Transfer** in the Conversation window.

The **Transfer Call** window appears.

4 Enter a transfer address, such as a telephone number or SIP address, select a **Recent** or **Directory** entry, or select an Assisted user from the drop-down list.

5 Click **To Voicemail**.

The call on hold is transferred to the selected Assisted user's voicemail. If the Assisted user has a static voicemail redirection, the call is redirected to the selected assistant user's voicemail.

Chapter 3
Presence

Topics in this section:

- "Understanding presence" on page 99
- "Managing your presence" on page 103

Understanding presence

Presence enables you to see the online status of other users on the network, lets others know your status, and also allows you to be immediately notified when a new watcher is requesting authorization to view your presence. Each presence icon represents a presence state as shown in the following table.

Icon	Available in this interface	Presence state(s)	Description
	Standard and Classic Personal Communicator Client	Unknown	No presence information is available.
	Standard and Classic Personal Communicator Client	Connected	User is registered in network.
	Standard and Classic Personal Communicator Client	Connected Away Connected Out to Lunch Connected Be Right Back Connected <custom note>	User is registered in network and has manually set this state to indicate that the user is currently unavailable.
	Standard and Classic Personal Communicator Client	Connected Inactive	User is registered in network, has automatic presence, and has not accessed the computer, where the Personal Communicator Client is currently registered, for a period of time.

Icon	Available in this interface	Presence state(s)	Description
	Standard and Classic Personal Communicator Client	Unavailable Unavailable Busy Unavailable On Vacation Unavailable Offline Unavailable <custom note>	User is registered in network and has manually set this state to indicate that the user may not be reachable, or user is not registered in network.
	Standard Personal Communicator Client	Active Available	User is registered in network, has automatic presence enabled, and is actively using the computer where the Personal Communicator Client is currently registered.
	Classic Personal Communicator Client		
	Standard Personal Communicator Client	Active On the Phone	User is registered in network, has automatic presence, and is actively on a call. You see the yellow icon if you use the standard Personal Communicator Client GUI, and the green icon if you use the classic GUI.
	Classic Personal Communicator Client		

You cannot manually set all of the presence states shown in the above table. For example, the **Connected Inactive** state is set by the Personal Communicator Client automatically when it detects you have been away from your computer for a specified amount of time.

Just as your contacts can see your presence status, you can also see whether they are online, offline, available, or unavailable. If you have a valid user identity of other communities, such as Yahoo, Google, AOL, MSN, and Jabber, and have contacts from these communities in your personal address book, then you can view the presence status of these contacts from your Personal Communicator Client. For more information, see “Adding a personal address book entry” on page 118.

Automatic presence

You can configure the Personal Communicator Client to automatically alert others whether you are away from your PC and/or on the telephone.

The ability to configure automatic presence notifications on the Personal Communicator Client depends on whether this service is assigned to you. If you do not have support for automatic presence, then you will not be able to use the automatic presence feature.

If automatic presence service is assigned to you, then you can configure your automatic presence settings. To access automatic presence settings, select **Tools, Preferences, Presence**.

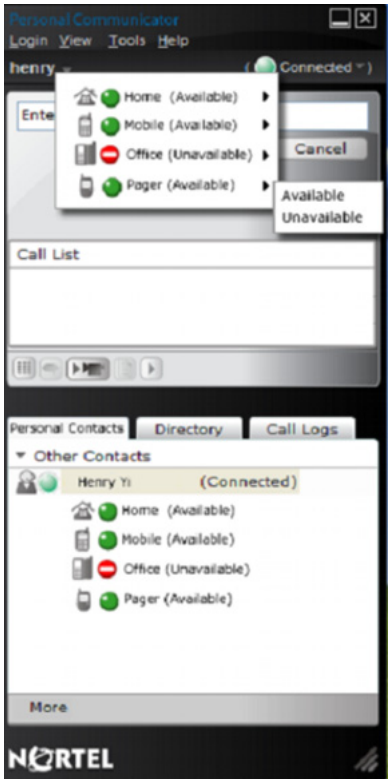
Tip: If you have automatic presence enabled, it will override a manual setting such as **Connected Inactive** or **Connected <custom note>**. The only manually selected presence states that are unaffected by Automatic Presence are “Unavailable” states, for example, **Unavailable Busy**.

For more information on configuring automatic presence detection, see “Setting automatic presence preferences” on page 212.

Multi Endpoint presence

Tip: This feature is specific to Standalone users.

Multi Endpoint presence service allows you to configure the Personal Communicator Client to show presence status of your personal contacts logged on different devices, such as their home phone, mobile, pager, and Personal Communicator Client. You can also configure the client to show your own presence status on different devices. However, you can use this service only if this service is assigned to you.



Managing your presence

Once you are registered with the network, the Personal Communicator Client allows you to change your presence information at any time. There are two different procedures you can use to change your presence in the network:

- "Changing presence state from the main menu" on page 103
- "Changing presence state from the presence shortcut menu" on page 103
- "Creating custom presence state notes" on page 104

Changing presence state from the main menu

To change your presence state using the Personal Communicator Client main menu,

1 Select **Login, Change My Status.**

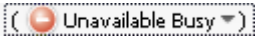
2 Select the desired presence state from the **Change My Status** submenu.

If you selected one of the **Unavailable** states, the Unavailable Setting window appears.

Unavailable Setting
You will remain 'Unavailable' until you manually change your presence status to 'Connected'. Do you want to continue?
OK
Cancel

3 Click **OK** to change your presence to the selected **Unavailable** state, or click **Cancel** to stop the presence change operation, leaving your current presence state unchanged.

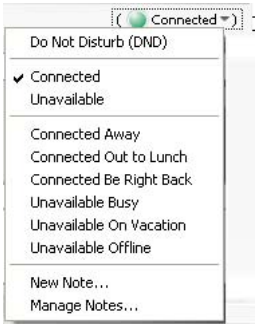
The Personal Communicator Client presence state status display indicates your new presence state.



Changing presence state from the presence shortcut menu

The procedure to change your presence state using the presence state shortcut menu is identical to changing it from the Personal Communicator Client main menu. The only difference is in accessing the presence state menu.

To initiate a presence change using the presence state status display shortcut menu, left-click or right-click on the presence state status display and select the desired presence state from the shortcut menu.

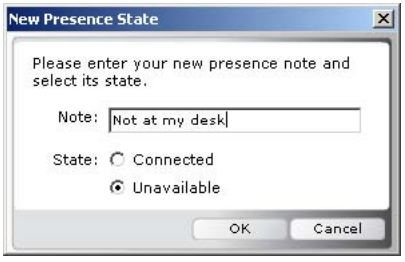


Creating custom presence state notes

The Personal Communicator Client allows you to add a presence note associated with either the **Connected** or **Unavailable** presence states. Other users will see your note next to your presence state.

To create a custom presence state note,

1. Select **Login, Change My Status**. Select the **New Note** menu item to bring up the **New Presence State** window. You can also select **New Note** from the presence state shortcut menu.



2. Type your note in the text area provided. Your note can be up to 32 characters long.
3. Select one of the **State** option buttons to choose the presence state for your note.

4 Click **OK** to save your note and change your current presence state to the new one you have just defined, or click **Cancel** to exit without saving the new note and leaving your current present state unchanged.

The Personal Communicator Client presence state display indicates your new presence state.

Managing custom presence state notes

To view and manage a list of the presence state notes that you create:

1 Select **Login, Change My Status**. Select the **Manage Notes** menu item to bring up the window. You can also select **Manage Notes** from the presence state shortcut menu.

2 To create a new custom presence state note, click **Insert** to bring up the **New Presence State** window.

3 Type your note in the text area provided. Your note can be up to 32 characters long.

4 Select the presence state for your note by clicking one of the **State** option buttons.

5 Click **OK** to save your note or click **Cancel** to exit the **New Presence State** window without saving the new note.

6 To modify an existing note, click the **Modify** button to bring up the **Modify Presence State** window.

7 To delete an existing note from the list, select the note and click **Remove**.

8 To change the order of the list of notes, select a note and click the **Up** or **Down** buttons.

9 Click **OK** to save all changes and close the **Manage Notes** window, or click **Cancel** to exit without saving any changes.

Routing your calls based on your presence state

If you have Presence-based routing service assigned, and your presence state is Unavailable Busy, you will be able to route your incoming calls in a specific way. This helps you work with no interruptions. Incoming calls will not ring on your clients. To create routes for your incoming calls, use the Route Wizard in the Personal Agent. For more information, see *Nortel Adaptive Application Engine Personal Agent User Guide* (NN48111-119).

Banning users from watching your presence state

You can ban your contacts from watching your presence information. If you choose to do this, this particular user will not be able to see your presence information when you are offline or online. To ban a user from watching your presence information, use the Route Wizard in the Personal Agent. For more information, see *Nortel Adaptive Application Engine Personal Agent User Guide* (NN48111-119).

Chapter 4
Managing your contacts and calls

Topics in this section:

- "Managing your call logs" on page 107
- "Managing your personal address book" on page 113
- "Using the global address book" on page 127
- "Managing your Friends" on page 139

Managing your call logs

The Personal Communicator Client keeps a record of all incoming and outgoing calls. All call log entries are stored into an inbox (for incoming calls) and an outbox (for outgoing calls).

Tip: To access your call logs, your Personal Communicator client must have voice enabled.

Checking your inbox

To check your inbox for your incoming calls,

1 Click **Call Logs** from the Personal Communicator Client main GUI, or select **View, Call Logs** from the main menu. The main GUI window expands to show the Call Logs display pane of the Personal Communicator Client.

2 Select **Inbox** in the Call Logs display pane to view your inbox entries.

Tip: Sort the entries in your inbox by any of the displayed columns by clicking the column name. To sort in reverse, click on the column name again.

Your missed calls are highlighted in bold and blue color. Note that the client does not populate the outbox when a Converged Desktop user makes a call that no one answers.

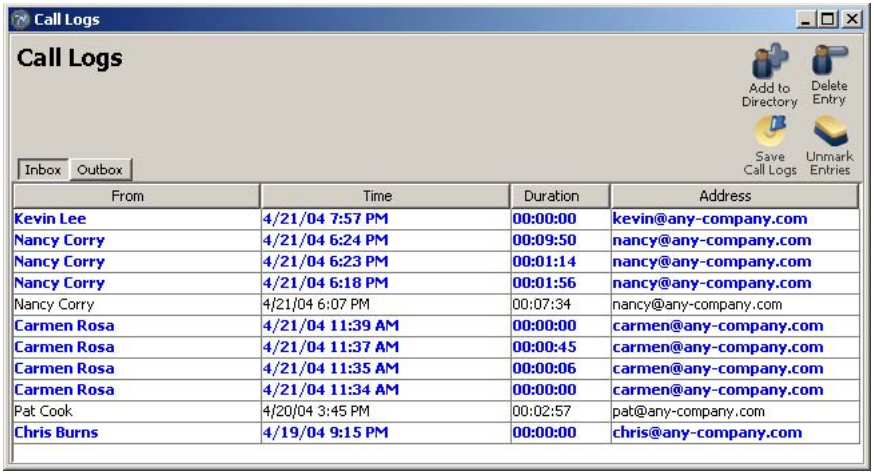
If you use the Classic Personal Communicator Client interface, you can separate the Call Logs display pane from the Personal Communicator Client main GUI to show a separate **Call Logs** window.

Tip: Remember, the ability to separate the Call Logs display pane from the Personal Communicator Client main GUI is not available in the Standard Personal Communicator Client interface.

To separate the Call Logs display pane from the main GUI,

1 Click and drag the Call Logs display pane title bar away from the Personal Communicator Client main GUI.

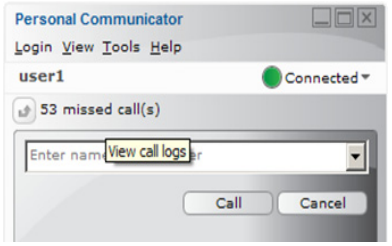
2 Release the mouse button and the Call Logs display pane becomes its own **Call Logs** window.



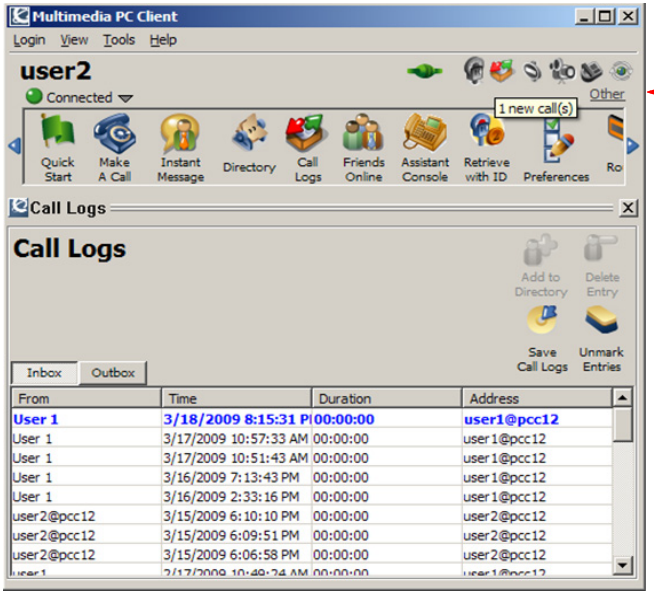
Tip: You can re-attach the **Call Logs** window to the Personal Communicator Client main GUI by dragging the **Call Logs** window back to the bottom display area of the Personal Communicator Client main GUI and releasing the mouse button.

Viewing your missed calls

If you miss a call on your Personal Communicator Client, the main window shows an icon indicating missed calls and also identifying the number of missed calls. In the Personal Communicator Client Standard interface, this icon appears only when you have missed calls. However, in the Personal Communicator Client Classic interface, this icon is always visible and starts blinking when you have missed calls and stops blinking when you press the icon.



Standard Personal Communicator Client



Classic Personal Communicator Client

Returning a missed call

In the inbox, your missed calls are colored blue and bold highlighted. To return a missed call, double-click on a missed inbox entry.

The Personal Communicator Client initiates a call to the address of the selected call log entry.

Tip: An alternate method for returning a call in the **Call Logs** is to right-click on a call log entry and select **Call** from the shortcut menu.

Acknowledging missed call log entries

To acknowledge a missed call log entry, click on a missed call log entry.

The Personal Communicator Client removes the blue and bold highlighting of the missed call log entry.

Tip: To acknowledge all missed calls at one time, click the **Unmark Entries** button in the Call Logs display pane in the Classic Personal Communicator Client interface; click the **More commands** button in the Standard Personal Communicator Client interface.

Checking your outbox

To check your outbox for a list of your outgoing calls,

1. Click **Call Logs** from the Personal Communicator Client main GUI, or select **View, Call Logs** from the main menu.

   The window expands to include the Call Logs display pane.

2. Select **Outbox** in the Call Logs display pane to view your outbox entries in the Personal Communicator Client.

Tip: Sort the entries in your outbox by any of the displayed columns by clicking the column name. To reverse the sort, click on the column name again.

Deleting call log entries

To permanently delete a call log entry,

1 Select the call log entry you wish to delete.

2 Delete the entry as shown in the following table.

In this interface	Select one of the options
Standard Personal Communicator Client	• Right click the call log entry and click **Delete**. • Right click the call log entry and press **Delete** on your keyboard. • From the bottom of the call logs panel, click **More** > **Delete Entry**.
Classic Personal Communicator Client	• Click **Delete Entry** on the Call Logs display pane. • Click **Delete Entry** on the **Call Logs** window. • Right click the call log entry and press **Delete** on your keyboard.

A Delete Call Log Entries dialog box appears.

3 Select **Yes** to delete the call log entry.

Tip: You can remove multiple call log entries from the inbox (or outbox) at the same time. Select a range of multiple entries (using either shift-click or ctrl-click) and then click **Delete Entry**.

Saving call log entries

You can save your call log entries from your inbox or outbox onto your PC.

Tip: Remember, this option is only available if you use the Classic Personal Communicator Client interface.

The tip on saving call logs indicates that this is only possible on the Classic client. This is not true as the "More commands" button on the Standard client Call Logs also has the "Save Call Logs" command.

To save your call log entries on your PC,

1 Select **Inbox** or **Outbox**.

In this interface	Select
Standard Personal Communicator Client	**More commands, Save Call Logs**
Classic Personal Communicator Client	**Save Call Logs**

2 Select the folder where you wish to save the call log entries.

For example, you can save the file on your desktop.

3 Click **Save**. The file is automatically saved as a .txt file.

Managing your personal address book

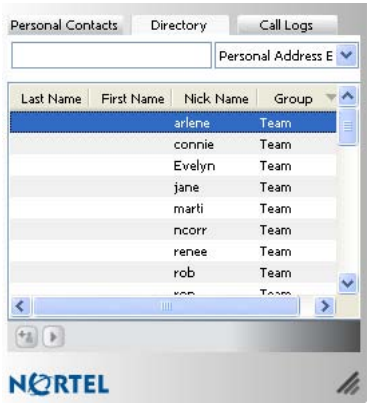
Your Personal Communicator Client personal address book helps you manage, track, and access information about all of your key contacts. You can choose how the Personal Communicator Client displays your contacts. When you sign in, your personal address book is downloaded and synchronized from the network.

Depending upon your Personal Communicator Client interface, use one of the following procedures to view your personal address book:

- "Viewing your personal address book using the Standard interface" on page 114
- "Viewing your personal address book using the Classic interface" on page 114

Viewing your personal address book using the Standard interface

To display your personal address book, click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu. The window expands to show the Directory display pane.



Tip: Sort the entries in your personal address book by any of the displayed columns by clicking the column name. To sort in reverse, click on the column name again.

Viewing your personal address book using the Classic interface

From the Classic Personal Communicator Client interface, you can display your personal address book in list view or card view.

- "Viewing your personal address book – List View" on page 115
- "Viewing your personal address book – Card View" on page 115

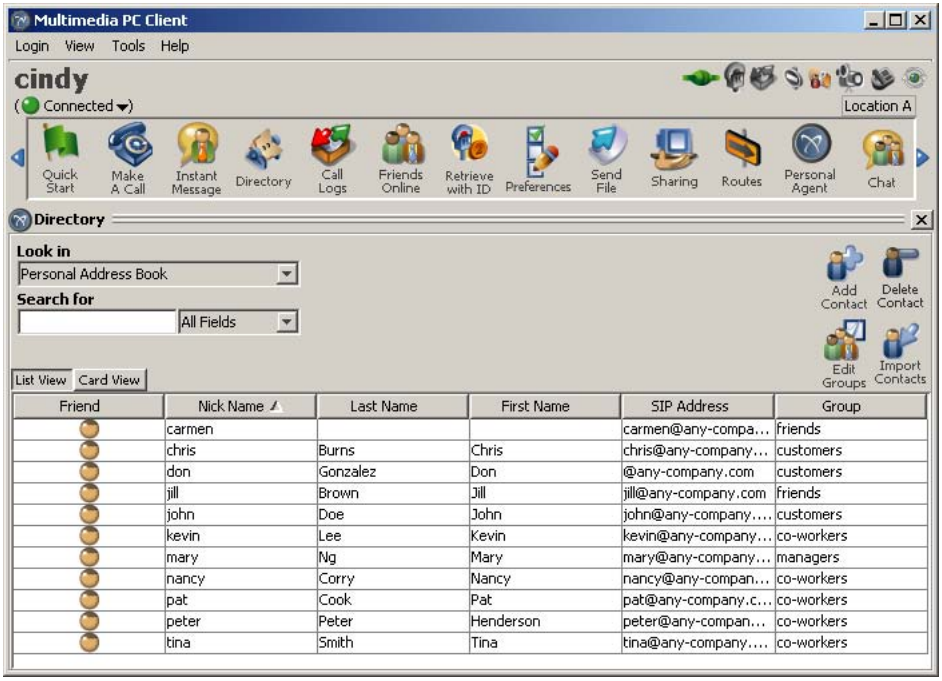
Viewing your personal address book – List View

To display your personal address book in list view,

1 Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu.

The main GUI window expands to show the Directory display pane.

2 Select the **List View** tab in the Directory display pane to view your personal address book entries in a list view.



Tip: Sort the entries in your personal address book by any of the displayed columns by clicking the column name. To sort in reverse, click on the column name again.

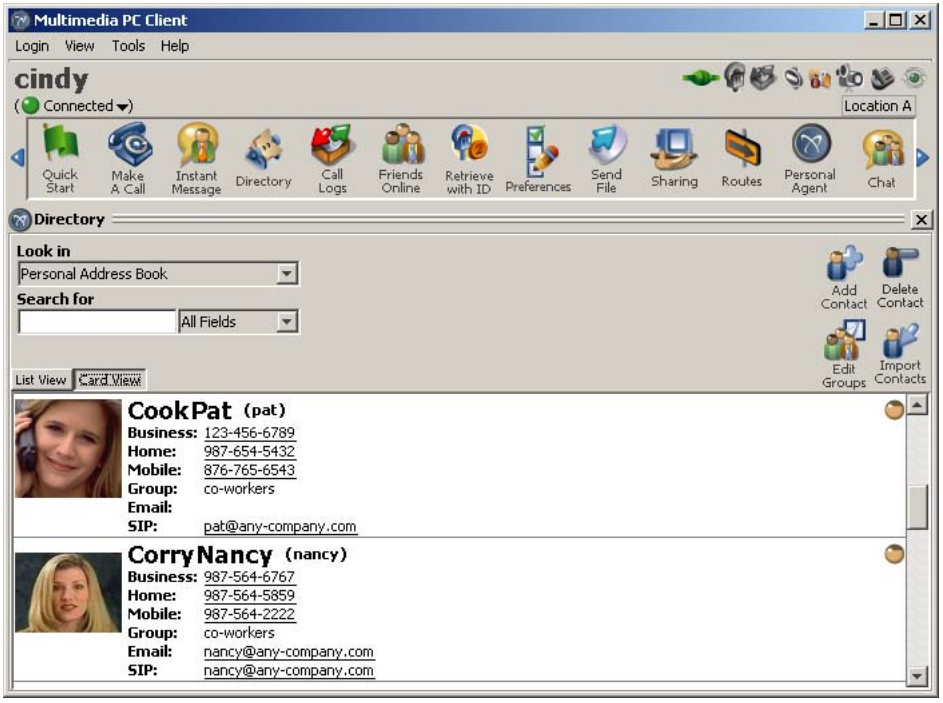
Viewing your personal address book – Card View

To display your personal address book in the card view,

1 Click **Directory** on the Personal Communicator Client main toolbar, or select **View, Directory** from the main menu.

The main GUI window expands to show the Directory display pane.

2 Select the **Card View** tab in the Directory display pane to view your personal address book entries in a card view.



Personal address book entry commands

From a selected **Directory** entry, the Personal Communicator Client allows you to access many commands. To see what commands are available for a selected personal address book entry,

1 Select the **Directory** entry.

2 Right-click on the **Directory** entry to display a shortcut menu of available actions.

3 Select the action you wish to perform on the entry.

Select	To	In this interface
Call	Call the user using their primary contact address.	Standard and Classic Personal Communicator Client
Call at	Call the user at a specified PSTN number.	Standard and Classic Personal Communicator Client
Send Instant Message	Send an instant message to the user.	Standard and Classic Personal Communicator Client
View Details	Display detailed information about the user.	Standard and Classic Personal Communicator Client
Edit	Edit the contact information for the user or remove the user from your personal address book.	Standard and Classic Personal Communicator Client
Delete	Remove the user from your personal address book.	Standard and Classic Personal Communicator Client
Friend	Add or remove the user to your Friends Online list.	Classic Personal Communicator Client
Show availability	Add or remove the user to your Personal Contacts list.	Standard Personal Communicator Client
Trusted user	Accept files or use the sharing capability with your contact without receiving the **Accept** option.	Standard and Classic Personal Communicator Client
Email	Send an email to the user.	Standard Personal Communicator Client
Send File	Send a file to the user.	Standard and Classic Personal Communicator Client
Sharing (if enabled)	Start a sharing conversation with the user.	Standard and Classic Personal Communicator Client

The list of available shortcut actions depends on how much information is available for the address book entry. For example, if the selected address book entry has a home phone number, then an option to call the user at that home phone number also appears on the action menu.

Adding a personal address book entry

The Personal Communicator Client allows you to add entries to your personal address book. The maximum number of personal address book entries you can add depends on your services.

You can communicate with users from other communities, such as Yahoo, Google, AOL, MSN, and Jabber by adding their contact information in your personal address book. To successfully, communicate with external communities, you must do the following:

- Get access to the XMPP Gateway service from your voice service provider (an Enterprise or Carrier).
- Use the Personal Agent to configure the XMPP Gateway service with your external gateways' credentials.
- Strictly follow the naming conventions as shown in the following table:

For this user	Use this naming convention
Yahoo user	user@yahoo
AOL user	user@aol
Google user	• user@gtalk (if the user's domain is gmail.com) • user@gtalk.domain (if the user's domain is not gmail.com)
MSN user	• user@msn (if the user's domain is hotmail.com) • user@msn.domain (if the user's domain is not hotmail.com)
Jabber user	• user@xmpp (if the contact is hosted on the same XMPP gateway server as the subscriber) • user@xmpp.domain (if the contact is hosted on another XMPP gateway server)

If you are offline and try to add a new contact, but you have exceeded the maximum number of offline contacts, the following message appears: “No more entries can be added while logged out. Please log in first.”

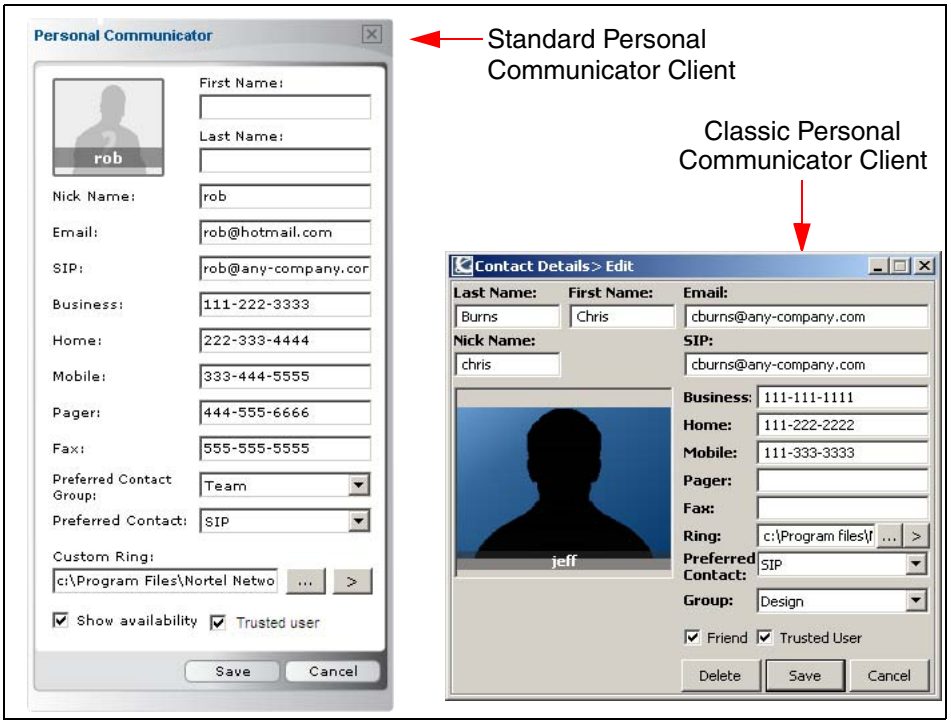
To add a new personal address book entry,

1 Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2 Click **Add Contact** in the Directory display pane.

The Personal Communicator Client displays a new **Contact Details, Add** window.

3 Enter the data for the new address book entry in the appropriate text field.



Nortel recommends that you provide as much information as possible for your contacts. However, all fields are optional except **Nickname**, **SIP**, and **Preferred Contact.** Provide values for **Nickname,** add a primary contact (SIP address or phone number) for **SIP**, and specify a **Preferred Contact** from the drop-down list.

Preferred Contact specifies the preferred method of calling the contact. When you call a contact in Directory or Friends Online windows (by double-clicking on the entry or by right-clicking on the entry and selecting "Call <contact>" from the shortcut menu), the preferred contact field is dialed.

The information you add as your contact's nickname is displayed where applicable, in all modes of the Personal Communicator Client (PCC).

By default, the preferred method of contact is the contact's SIP address. Other possible values are Home Phone, Business Phone, Mobile, Pager, and Fax.

Tip: If you do not specify a SIP address, the Personal Communicator Client generates one using the preferred contact field that you specify. For example, if the preferred contact is "Home Phone" with number 555-5555, a SIP address like "5555555@domain.com" is generated. Nortel does not guarantee that the SIP address generated will be valid and usable (for example, for making calls or marking as friend). If you create a contact without specifying a SIP address, all that Nortel can guarantee is that you will attempt to call that contact at the preferred number provided.

4 If you want to place this entry in a directory group, select the group as shown in the following table:

In this interface	Select
Standard Personal Communicator Client	**Preferred Contact Group** drop-down list
Classic Personal Communicator Client	**Group** drop-down list

5 If you want to select a particular ring tone for your contact, see "Selecting ring tones for contacts" on page 121.

6 If you want to receive presence information about this user, select the check box as shown the following table.

In this interface	Select
Standard Personal Communicator Client	the **Show availability** check box
Classic Personal Communicator Client	the **Friend** check box
If the presence service is not assigned to you, then you cannot access this check box.	

7 If you wish to accept files and other sharing actions with this contact without getting the **Accept** option, select the **Trusted user** check box. This check box is visible only if Client Collaboration service is enabled for this contact.

8 Click **Save** to save your changes or **Cancel** to exit without saving.

Selecting ring tones for contacts

You can select a ring tone for a contact in your personal address book so that you can identify the incoming calls from this contact without looking at the incoming call window.

Ring tones are stored as .wav files in the Personal Communicator Client installation directory. Ask your system administrator if other ring tones are available.

To select a ring tone for a new or existing personal address book entry,

1 Click **Add Contact** in the Directory display pane.

A new **Contact Details, Edit** window appears, or right-click on an existing address book contact name and select **Edit**.

2 Enter the data for the new address book entry in the appropriate text field.

3 Locate your .wav ring tone file as shown in the following table.

In this interface	Select
Standard Personal Communicator Client	the "**...**" button under the **Custom Ring** field
Classic Personal Communicator Client	the "**...**" button beside the **Ring** field

A navigation window opens.

4 Navigate to the directory location of your .wav ring tone files and select a file.

5 Click **Open**.

The file path to the ring tone appears in the field. Incoming calls from this contact will sound this ring tone.

6 Click the "**>**" button to hear the ring tone you have selected.

7 Click **Save**.

Viewing a personal address book entry

To view the details of a personal address book entry,

1 Select the **Directory** entry.

2 Right-click on the **Directory** entry and select **View Details** from the shortcut menu of available actions.

The Personal Communicator Client displays a **Contact Details** window for the selected entry.

Tip: You can initiate a call to a specific number (or address) shown in the Contact Details window by clicking on the highlighted field.

Editing a personal address book entry

To edit the details of a personal address book entry,

1 Select the **Directory** entry.

2 Right-click on the **Directory** entry and select **Edit** from the shortcut menu of available actions.

The Personal Communicator Client displays a **Contact Details, Edit** window for the selected entry.

3 Enter any data you wish to change in the appropriate text field.

4 If you want to place this entry in a different directory group, use the **Group** drop-down list to select the group for the entry.

5 If you want to receive presence information about this user, select the check box as shown the following table.

In this interface	Select
Standard Personal Communicator Client	the **Contact is a friend** check box.
Classic Personal Communicator Client	the **Friend** check box
If the presence service is not assigned to you, then you cannot access this check box.	

6 Click **Save** to save your changes or **Cancel** to exit without saving.

Deleting a personal address book entry

The Personal Communicator Client allows you to remove personal address book entries.

Your personal address book is stored on the network and shared by all clients where you are logged on. When you delete an address book entry, it no longer appears on any of your clients (including the Personal Agent). If you remove an address book entry using the Personal Agent, that entry is also removed from the Personal Communicator Client personal address book.

To delete a personal address book entry,

1 Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2 Use the following table to select the **Delete Contact** button.

In this interface	Click
Standard Personal Communicator Client	the "**>**" button and select **Delete Contact**
Classic Personal Communicator Client	**Delete Contact**

A delete confirmation dialog box appears.

3 Select **Yes** to delete the address book entry.

Tip: You can remove multiple address book entries from your personal address book at the same time. Select a range of multiple entries (using either shift-click or ctrl-click) and then click **Delete Contact**.

Adding a new group to your personal address book

The Personal Communicator Client allows you to organize your personal address book entries into address book groups. For example, you can group contacts for a major project into one category, personal contacts in another, and administrative contacts in another.

To add a new directory group,

1 Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2 Select the **Edit Groups** button.

In this interface	Click
Standard Personal Communicator Client	the “**>**” button and select **Edit Groups**
Classic Personal Communicator Client	**Edit Groups**

The Personal Communicator Client displays the **Groups** window.

3 Select the **<Add New Group>** label and type in the name of the new group.

4 Press **Enter**. The group name is added to the list of groups.

Tip: You can create additional groups without closing the **Groups** window. Repeat Step 3 and Step 4 for each new group name you wish to create.

5 Click **Close** when you are done adding new group names.

Renaming a group in your personal address book

The Personal Communicator Client allows you to rename groups in your personal address book.

If a group that contains address book entries is renamed, then all the entries are automatically moved to the renamed group.

To rename a personal address book group,

1 Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2 Select the **Edit Groups** button.

In this interface	Click
Standard Personal Communicator Client	the “**>**” button and select **Edit Groups**
Classic Personal Communicator Client	**Edit Groups**

The Personal Communicator Client displays the **Groups** window.

3 Double-click on the group you wish to rename to activate edit mode on the group.

4 Type in the new name of the group and press **Enter**.

The group has now been renamed.

Tip: Additional groups can be renamed without closing the **Groups** window. Repeat Step 3 and Step 4 for each group you wish to rename.

5 Click **Close** when you are done renaming groups.

Removing a group in your personal address book

The Personal Communicator Client allows you to remove groups in your personal address book.

If a group that contains address book entries is removed, the entries are not removed. Those address book entries remain in your personal address book but are not associated with a group.

To remove a personal address book group,

1 Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2 Use the following table to select the **Edit Groups** button.

In this interface	Click
Standard Personal Communicator Client	the “>” button and select **Edit Groups**
Classic Personal Communicator Client	**Edit Groups**

3 Select the group you wish to remove.

4 Click **Remove** to remove the group.

Tip: Additional groups can be removed without closing the **Groups** window. Repeat Step 3 and Step 4 for each group you wish to remove.

Searching an entry in your personal address book

The Personal Communicator Client allows you to quickly search for a contact in your personal address book.

To search for a name in your personal address book,

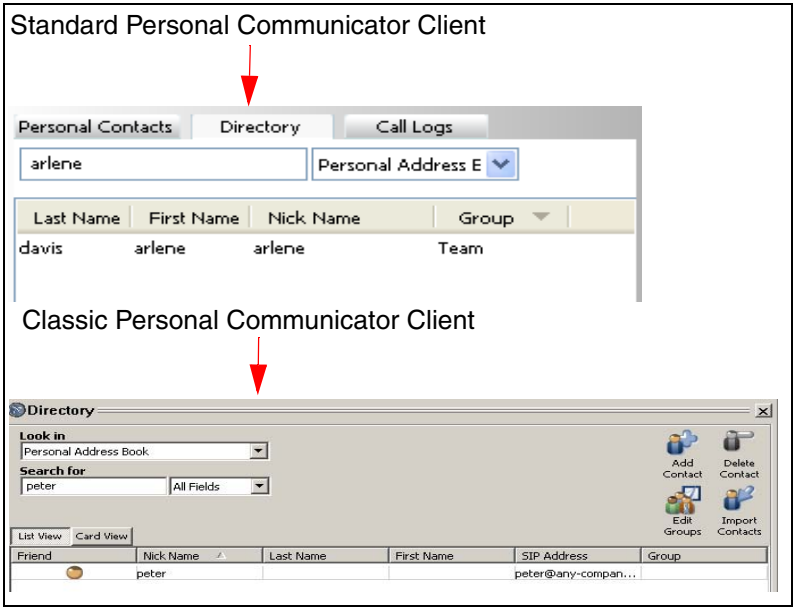
1 Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2 Type the name of your contact.

In this interface	Type the name of your contact
Standard Personal Communicator Client	in the field under the Personal Contacts tab
Classic Personal Communicator Client	in the **Search for** field

3 Search the person's nickname, first name, last name, phone number, or SIP address from the drop down list.

The window displays the name of the person.



Using the global address book

The global address book is a directory of all users in your domain. This list is created and maintained by your service provider or system administrator.

Access to the global address book depends on whether or not it is enabled by your system administrator. You will receive the following message if the address book is not enabled: “The global address book has been disabled by the network system administrator.”

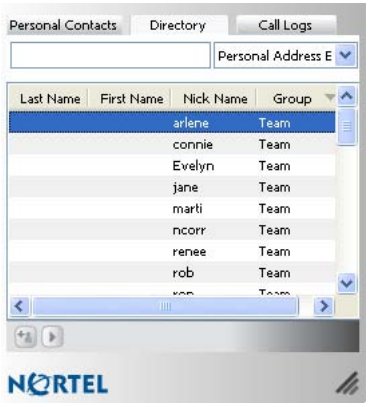
Depending upon your Personal Communicator Client interface, use one of the following procedures to view your global address book:

- “Viewing your global address book using the Standard interface” on page 128
- “Viewing your global address book using the Classic interface” on page 129

Viewing your global address book using the Standard interface

To display your global address book,

1 Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu. The window expands to show the Directory display pane.



Tip: The drop-down list defaults to the personal address book entry.

2 Select the Global Address Book from the drop-down list under the Call Logs tab to view the entries.

Viewing your global address book using the Classic interface

From the Classic Personal Communicator Client interface, you can display your global address book in list view or card view.

The global address book has two viewing options for your contacts:

- List view, which is a traditional “table-like” view
- Card view information, like you would normally see on a business card (including a picture of the contact, if available)

Viewing the global address book – List View

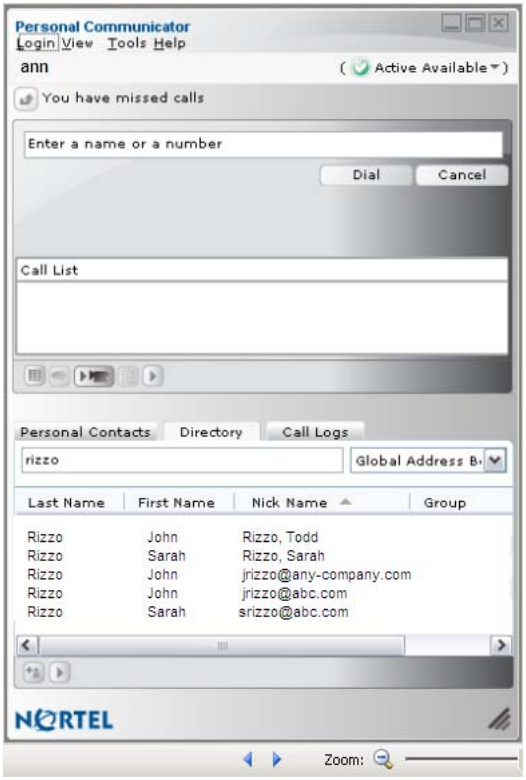
To display the global address book in list view,

1. Click **Directory** on the Personal Communicator Client main toolbar or select **View, Directory** from the main menu.

   The main GUI window expands to show the Directory display pane.

2. Select **Global Address Book** from the **Look in** field.

3 Select the **List View** tab in the Directory display pane to view the global address book entries in a list view.



Viewing the global address book – Card View

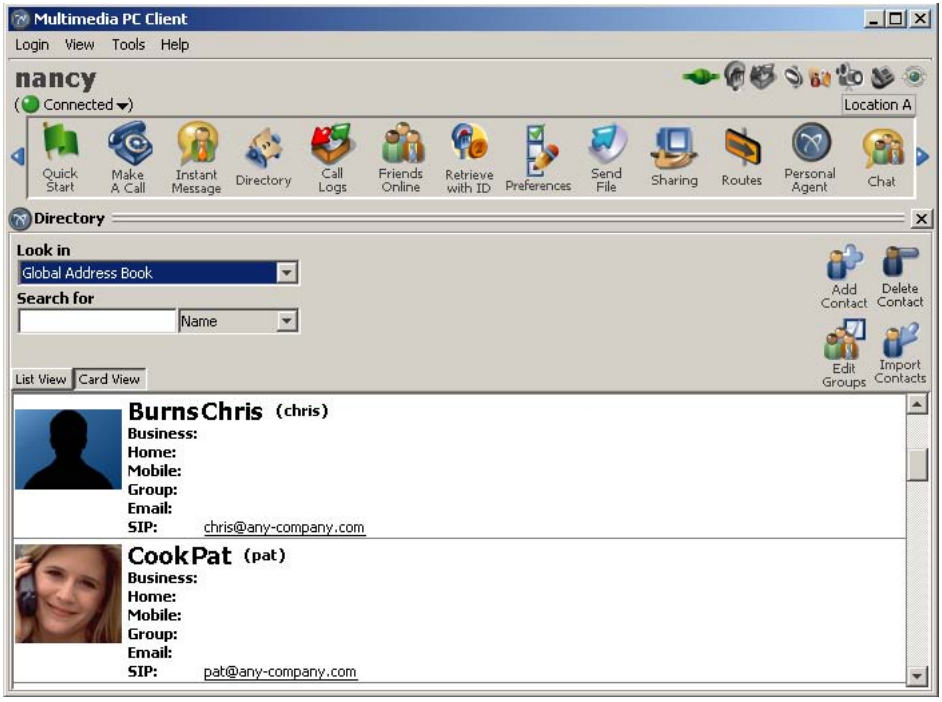
To display the global address book in card view,

1 Click **Directory** on the Personal Communicator Client main toolbar, or select **View, Directory** from the main menu.

The main GUI window expands to show the Directory display pane.

2 Select **Global Address Book** from the **Look in** field.

3 Select the **Card View** tab in the Directory display pane to view the global address book entries in a card view.



Viewing a global address book entry

To view the details of a global address book entry,

1 Select the **Directory** entry.

2 Right-click on the **Directory** entry and select **View Details** from the shortcut menu of available actions.

The Personal Communicator Client displays a **Contact Details** window for the selected entry.

Tip: You can initiate a call to a specific number (or address) shown in the Contact Details window by clicking on the highlighted field.

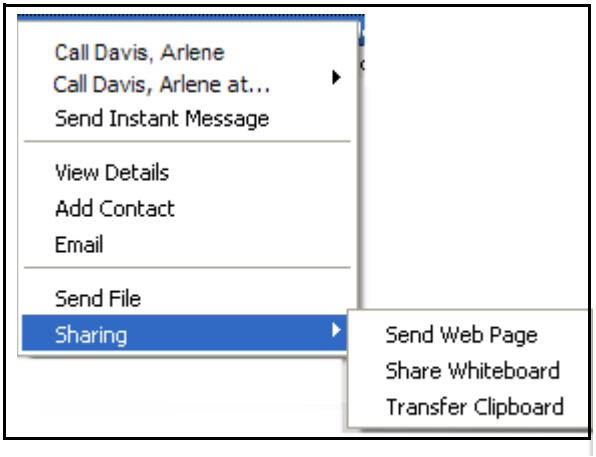
Global address book entry commands

From a selected **Directory** entry, the Personal Communicator Client allows you to access many commands.

To see what commands are available for a selected global address book entry,

1 Select the **Directory** entry.

2 Right-click on the Directory entry to display a shortcut menu of available actions.



3 Select the action you wish to perform on the entry.

Select	To
Call	call the user using their primary contact address.
Call at	call the user at a specified PSTN number.
Send Instant Message	send an instant message to the user.
View Details	display detailed information about the user.
Add Contact	add the contact information to the Personal Address Book.
Email	send an email
Send File	send a file to the user.
Sharing (if this service is assigned to you)	start a sharing conversation with the user.

Searching an entry in the global address book

The Personal Communicator Client allows you to quickly search for a contact in the global address book.

To search for a name in your global address book,

1. Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.
2. Select **Global Address Book.**

In this interface	Select
Standard Personal Communicator Client	**Global Address Book** from the drop-down list under the **Call Logs** tab
Classic Personal Communicator Client	**Global Address Book** from the drop-down list in the **Look in** field

3. Type the name of your contact.

In this interface	Type the name of your contact
Standard Personal Communicator Client	in the field under the **Personal Contacts** tab
Classic Personal Communicator Client	in the **Search for** field

From both Standard and Classic Personal Communicator Client interfaces, you have the option of searching by the person's name, first name, last name, phone number, or SIP address. If the search string you enter is too broad, you may receive the following message "User search will return too many entries. Please refine your search criteria." In this case, modify the criteria in the text box to narrow down your search so that your search results will appear.

If a global address book search matches more than 100 entries, the following error message appears and no results appear: "User search will return too many entries. Please refine your criteria."

Importing contacts from Microsoft Outlook

The Personal Communicator Client allows you to import contacts from your Microsoft Outlook email application main contact list to your personal address book.

Accessing the Import Contacts command

To start the Import Contacts command,

1. Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.
2. Use the following table to select the **Import Contacts** button.

In this interface	Click
Standard Personal Communicator Client	the “**>**” button and select **Import Contacts**
Classic Personal Communicator Client	**Import Contacts**

3. From the **Import Contacts** window**,** click on **Import**.

   The Microsoft Outlook displays a security window when the Personal Communicator Client attempts to access the contacts list in Outlook.

Microsoft Outlook
A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?
If this is unexpected, it may be a virus and you should choose "No".
Allow access for
1 minute
Yes
No
Help

4. Select the **Allow access for** check box and select **1 minute** from the drop-down list.

   There may be a short delay while the Personal Communicator Client retrieves the information from Outlook.

   Depending on your security settings, the Microsoft Outlook security window may not appear on your computer.

After the Personal Communicator Client retrieves the information, the Personal Communicator Client main GUI expands to show the Outlook Contacts Import display pane.

Tip: Sort the entries by any of the displayed columns by clicking the column name. To reverse the sort, click on the column name again.

Importing the results of the Import Contacts command

Once the Personal Communicator Client has obtained the contact information from Outlook, the Import Outlook Contacts pane displays a list of all the contacts that you can now add to your personal address book.

To import Outlook contacts into your personal address book,

1. Select an entry in the Import Outlook Contacts display pane list.
2. Select a group from the **Group** drop-down list. Select **<none>** if you do not want to add the contact into a group.
3. Click **Add Contacts** and the contact is added to your personal address book.

   If the entry you select is missing a required field, an error message appears and allows you to enter the missing field data.
4. Repeat Step 1 through Step 3 for each Outlook contact you wish to add to your personal address book.

Tip: You can import multiple contacts at the same time. Select a range of multiple entries (using either shift-click or ctrl-click), select the directory group, and then click **Add Contacts**. These contacts are added to your personal address book in the group you selected.

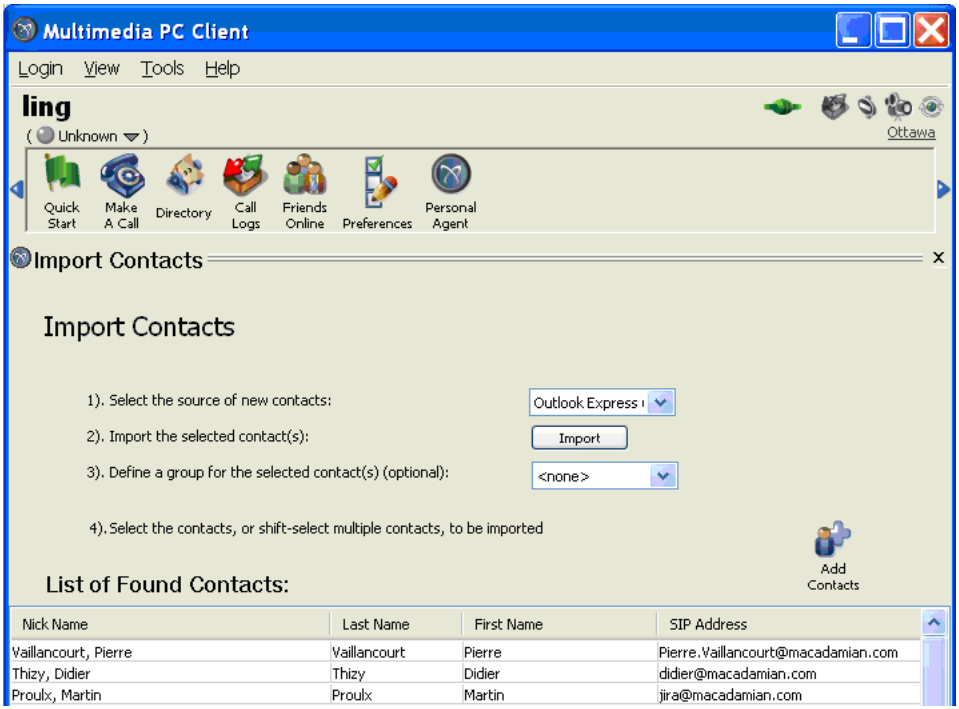
Importing contacts from Microsoft Outlook Express

The Personal Communicator Client allows you to import contacts from your Microsoft Outlook Express email application main contact list to your personal address book.

Accessing the Import Contacts command

From the Import Contacts window,

1 Under, **Select the source of new contacts:**, select the option, **Outlook Express**.



2 Click the **Import** button to display the contents of the Outlook Express address book.

3 Import the contacts by either individually selecting a contact and clicking **Add Contacts** or by multi-selecting contacts (using the Shift or Ctrl keys) and then clicking **Add Contacts**.

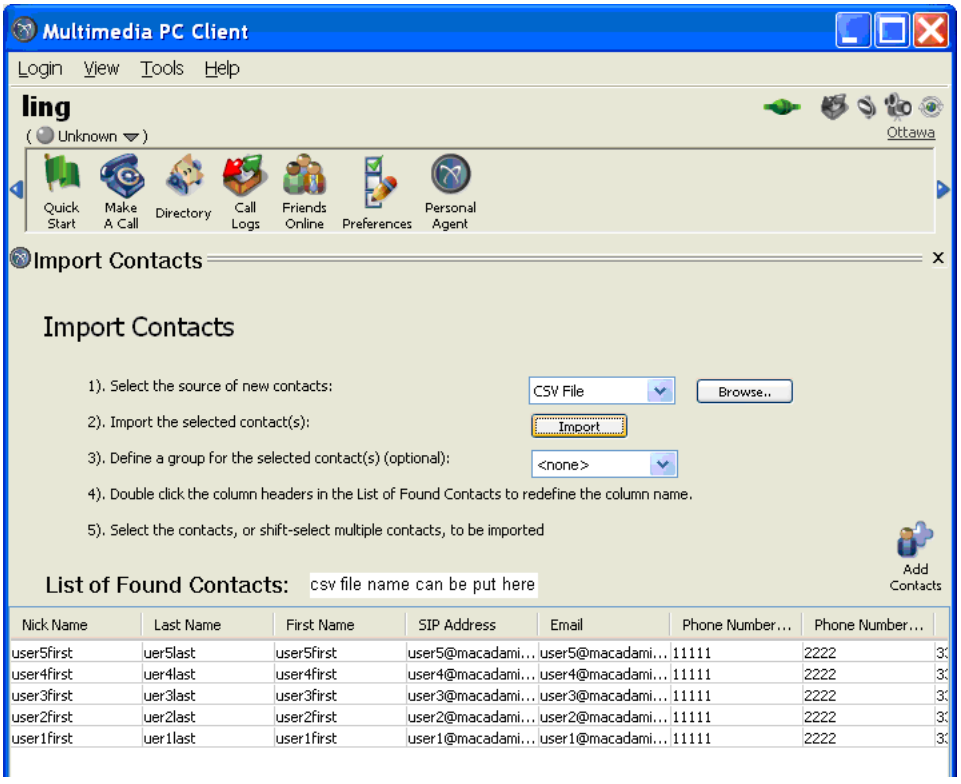
Importing contacts from CSV files

The Personal Communicator Client allows you to import contacts from Comma Separated Values (CSV) files to your personal address book.

Accessing the Import Contacts command

From the Import Contacts window,

1 Under, **Select the source of new contacts:**, select the option, **CSV File**.



2 Click the **Browse** button that appears to the right and navigate to the CSV file to import. The name of the selected CSV file appears next to **List of Found Contacts:**.

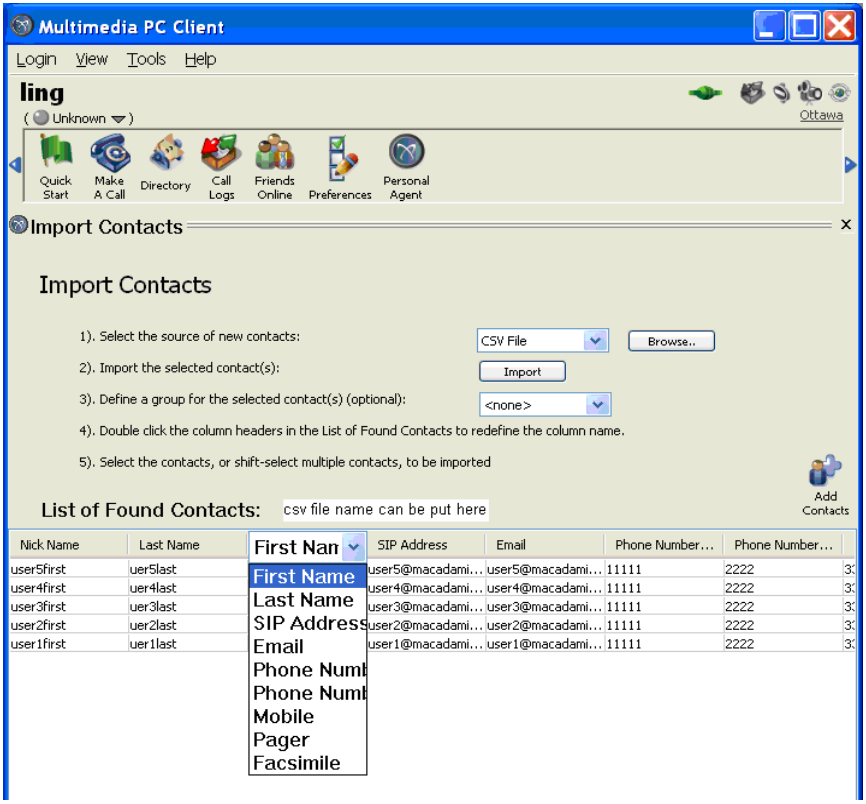
3 Click the **Import** button to display the contents of the CSV file.

4 To assign different names for the column headings, double-click on a column heading in the grid and select a name from the list (First Name, Last Name,

SIP Address, Email, Home Phone, Business Phone, Mobile Phone, Pager, Facsimile).

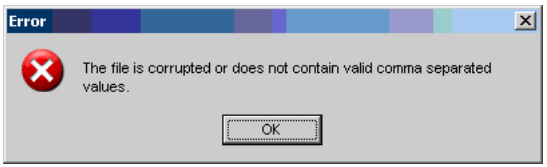
Tip: Duplicate column names are not allowed.

Tip: The Nick Name heading cannot be changed during the import process, however, it can be changed after the contact is imported into the address book.



5 Import the contacts by either individually selecting a contact and clicking **Add Contacts** or by multi-selecting contacts (using the Shift or Ctrl keys) and then clicking **Add Contacts**.

6 If the CSV file is not formatted correctly, the following error message is displayed.



Managing your Friends

The Personal Communicator Client allows you to mark personal address book entries as Friends and displays the presence information for these Friends.

Friends can prevent you from seeing their presence information. See *Nortel Adaptive Application Engine Personal Agent User Guide* (NN48111-119) for more information about how to ban users from seeing your presence information.

Your services determine the maximum size of your personal address book and the maximum number of entries that you can have as Friends.

Viewing your Friends online

To see the presence information for your Friends, select **View, Friends** from the main menu or select one of the following options.

In this interface	Click
Standard Personal Communicator Client	the **Personal Contacts** tab
Classic Personal Communicator Client	the **Friends Online** icon on the main toolbar

Entry commands for your contacts

From a selected contact that is designated as your friend, the Personal Communicator Client allows you to access many commands.

To see what commands are available for a selected personal address book entry,

1 Select the option depending upon your Personal Communicator Client interface.

In this interface	Click
Standard Personal Communicator Client	the **Personal Contacts** tab
Classic Personal Communicator Client	the **Friends Online** icon on the main toolbar

2 Right-click on the entry to display a shortcut menu of available actions.

3 Select the action you wish to perform on the entry.

Select	To	in this interface
Call	Call the user using their primary contact address.	Standard and Classic Personal Communicator Client
Call at	Call the user at a specified PSTN number.	Standard and Classic Personal Communicator Client
Send Instant Message	Send an instant message to the user.	Standard and Classic Personal Communicator Client
View Details	Display detailed information about the user.	Standard and Classic Personal Communicator Client
Friend	Add or remove the user to your Friends Online list.	Classic Personal Communicator Client
Show availability	Add or remove the user to your Personal Contacts list.	Standard Personal Communicator Client
Trusted user	Accept files or use the sharing capability with your contact without receiving the **Accept** option.	Standard and Classic Personal Communicator Client

Select	To	in this interface
Edit	Edit the contact information for the user or remove the user from your personal address book.	Standard and Classic Personal Communicator Client
Send File	Send a file to the user.	Standard and Classic Personal Communicator Client
Sharing (if enabled)	Start a sharing conversation with the user.	Standard and Classic Personal Communicator Client

The list of available actions also depends on the information available in the address book entry as your friend. For example, if the selected Friend has a home phone number in its address book entry, then an option to call the Friend at the home phone number also appears on the action menu.

Adding an entry as Friend

To mark a personal address book entry as a Friend,

1. Click **Directory** on the Personal Communicator Client main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.
2. Right-click on the **Directory** entry and select **Friend** to mark this entry as a Friend.

   The selected entry is now marked as a Friend and appears under a different menu.

In this interface	Friend entry appears in
Standard Personal Communicator Client	Personal Contacts entries
Classic Personal Communicator Client	Friends Online display pane

3 Select **View, Friends** from the main menu or select one of the following options.

In this interface	Click
Standard Personal Communicator Client	the **Personal Contacts** tab
Classic Personal Communicator Client	the **Friends Online** icon on the main toolbar

The window expands to show all your Friends entries. The newly added Friend now appears in the display pane.

Removing a Friend

To remove a Friend from your personal address book,

1 Select the entry you marked as your **Friend**.

2 Right-click on the entry and select **Friend** to mark this entry as not a Friend.

The checkmark against the Friend icon disappears and no longer appears.

In this interface	The deleted friend does not appear in
Standard Personal Communicator Client	the **Personal Contacts** list
Classic Personal Communicator Client	the **Friends Online** display pane

Tip: To remove a Friend from the Directory display pane, right-click on an address book entry, and select **Friend** to unmark the entry as a Friend.

Chapter 5
Sharing

Topics in this section:

- "Understanding sharing" on page 144
- "Starting a sharing conversation" on page 144
- "Ending a sharing conversation" on page 148
- "Sending web pages" on page 149
- "Transferring files" on page 154
- "Sharing a whiteboard" on page 158
- "Transferring the clipboard" on page 162

You must have the sharing services assigned to you to be able to send files, share a whiteboard, transfer the contents of your clipboard, and send web pages to a remote user.

If some or all of the client collaboration services described in this section are not assigned to you, then you will not be able to use the various sharing features. As a result, the following icons may not be present in the GUI:

- Share
- Send File
- Share Whiteboard
- Transfer Clipboard
- Send Web Page

Understanding sharing

The Personal Communicator Client enables two users to team together in a multimedia sharing conversation and enables one PC to support multiple peer-to-peer sharing conversations simultaneously. The table shows the sharing tools that the Personal Communicator Client offers.

This tool	Enables you to
Send File	send files to the remote user.
Share Whiteboard	collaborate with the remote user by entering text and graphic objects in a shared workspace. Both you and the remote user can manipulate and view the shared whiteboard equally.
Transfer Clipboard	send the contents of your Windows system clipboard.
Send Web Push	send web pages to the remote user.

Tip: With the exception of the **Send Web Push** command, the **Sharing** actions are only available when the other user is also using the Personal Communicator Client.

A Converged Desktop user can receive a web push on the Personal Communicator Client with Converged Desktop service.

Starting a sharing conversation

The Personal Communicator Client allows you to access the sharing commands at any time. For example, you can access them during an already established voice conversation or start a sharing conversation without establishing a voice conversation with the remote party.

Tip: To use sharing capabilities during a call, your Personal Communicator client must have voice enabled.

There are multiple ways to start a sharing conversation with or without being on a call on the Personal Communicator Client. The following table shows the most common ways to start the sharing conversation.

To share from this interface	You can
Standard Personal Communicator Client	• Right-click on any **Personal Contacts, Directory**, or **Call Logs** entry, and then select **Send File** or **Sharing** from the shortcut menu. Remember, right-clicking is a quick way to access extended actions that you can perform on a selected entry. • Manually type a number or an address in the Call area and click the **Send File** from the shortcut menu. • Manually type a number or an address in the Call area and click the **More Commands** from the shortcut menu to select **Transfer Clipboard**, **Send Web Page**, or **Share Whiteboard**.
Classic Personal Communicator Client	• Select **Tools, Send File** from the main menu. • Select **Tools, Sharing** from the main menu. • Double click on the Sharing icon on the main GUI. • Right-click on any **Directory**, **Call Logs**, or **Friends Online** entry, and then select **Send File** or **Sharing** from the shortcut menu.

When you start a sharing conversation with a user, you receive an Accept option to start the sharing action, such a sending a web page, transferring a clipboard, sharing a whiteboard, or sending or receiving a file. If you wish to eliminate the Accept option in a sharing conversation with your contact, configure this contact as a Trusted User. For more information, see "Adding a personal address book entry" on page 118.

Starting a sharing conversation during a call using the Standard interface

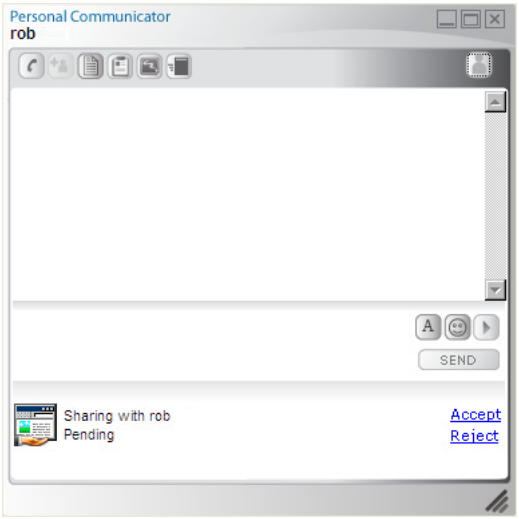
To access the sharing tools during a voice conversation using the Standard Personal Communicator Client interface,

1 Make or answer a call.

2 Select the sharing option you wish to use under the Call List area.

To	Click
Send a file	**Send file**.
Transfer clipboard	**More Commands, Transfer Clipboard.**
Send a web page	**More Commands, Send Web Page.**
Share Whiteboard	**More Commands, Share Whiteboard.**

A separate window opens, showing that the sharing action you selected is pending.



Tip: With the exception of the **Send Web Push** command, the **Sharing** actions are only available when the other user is also using the Personal Communicator Client.

Starting a sharing conversation during a call using the Classic interface

To access the sharing tools during a voice conversation using the Classic Personal Communicator Client interface,

1 Make or answer a call.

2 Click **Share** on the active Conversation window.

The **Conversation** window expands to show the sharing control pane.

3 Select the sharing tool you wish to use, such as **Send File**, **Transfer Clipboard, Send Web Page,** or **Share Whiteboard**.

Tip: With the exception of the **Send Web Push** command, the **Sharing** actions are only available when the other user is also using the Personal Communicator Client.

Starting a Whiteboard, Clipboard, and Web Page sharing conversation without a call

To start a sharing conversation to access the Share Whiteboard, Transfer Clipboard, or Send Web Page sharing tools,

1 Select one of the following **Sharing** options.

In this interface	Use one of these options
Standard Personal Communicator Client interface	• Right-click on any **Personal Contacts, Directory**, or **Call Logs** entry, and then select **Sharing** from the shortcut menu. • Type a number or an address in the Call area and click the **More Commands** from the shortcut menu to select **Transfer Clipboard** **Send Web Page** **Share Whiteboard**.
Classic Personal Communicator Client interface	• Right click on any **Friends online** entry and then select **Sharing** from the shortcut menu. • Click **Sharing** from the main GUI, select the name or address from the **Share with** window to start a sharing conversation.

Ending a sharing conversation

To end a sharing conversation, select one of the following options.

In this interface	Use this option
Standard Personal Communicator Client	Shut down the **Sharing** window.
Classic Personal Communicator Client	Click **Stop** in the Conversation window you want to end.

Sending web pages

The Personal Communicator Client lets you push (send) web pages for display on another user's screen. It also enables you to view web pages pushed from another user.

Pushing a web page to another party on an active call

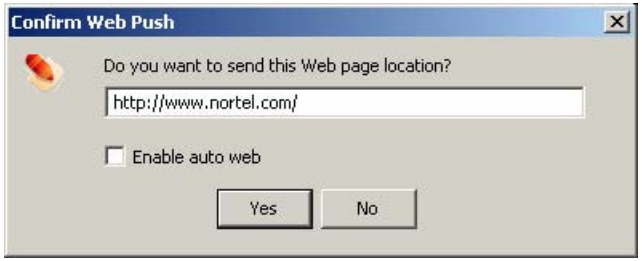
To push the active web page on your browser to another party on an active call,

1 Select **Send Web Page** button.

In this interface	Click
Standard Personal Communicator Client interface	**More Commands, Send Web Page** under the **Call List** area.
Classic Personal Communicator Client interface	**Share** and then click **Send Web Page** from the expanded **Conversation** window for the call.

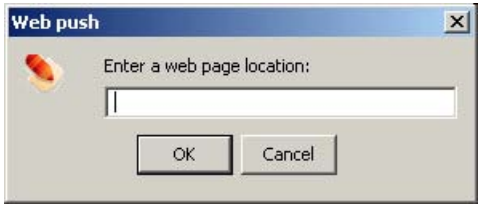
The Personal Communicator Client displays a window to enter or confirms a web page selection to be pushed to the remote computer.

If the Personal Communicator Client was able to communicate with a compatible running web browser application, a **Confirm Web Push** window appears, with the current web page URL already entered for you.



2 Click **Yes** to push the web page to the other computer.

3 If the Personal Communicator Client was unable to communicate with a compatible running web browser application, an empty **Web Push** window opens.



4 Enter a URL and click **OK** to push the web page to the other computer.

Pushing a web page to another party not on an active call

To push the active web page on your browser to another party not on an active call,

1 Select the contact you wish to send the web page to.

In this interface	Do this
Standard Personal Communicator Client	• Type the name or SIP address of the party in the **Call** area. • Select the name or SIP address from the **Personal Contacts** tab, **Directory** tab, or **Call Logs** tab.
Classic Personal Communicator Client	• Select **Tools, Sharing** or **Sharing** button from the main GUI and type the name or SIP address in the **Share with** window. • Select **Tools, Sharing** or **Sharing** button from the main GUI and select the contact from **Friends**, **Recent**, or **Directory** button.

2 Click the **Send Web Page** option.

In this interface	Click
Standard Personal Communicator Client	**More Commands, Send Web Page**
Classic Personal Communicator Client	**Send Web Page**

3 If the Personal Communicator Client was able to communicate with a compatible running web browser application, a **Confirm Web Push** window appears, with the current web page URL already entered for you. Click **Yes** to push the web page to the other computer.

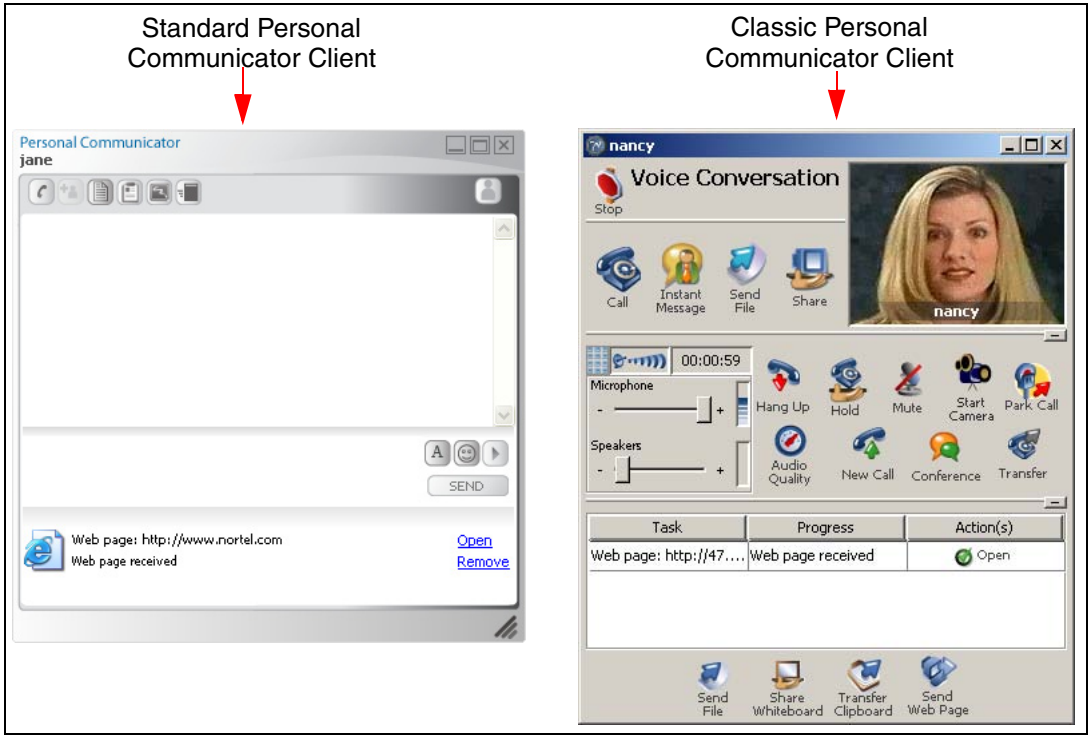
4 If the Personal Communicator Client was unable to communicate with a compatible running web browser application, an empty **Web Push** window opens. Enter a URL and click **OK** to push the page to the other computer.

Receiving web pages

When you receive a web page, the following window appears depending upon your interface.

In this interface	You see
Standard Personal Communicator Client	a sharing window, showing the URL of the web page you received
Classic Personal Communicator Client	the **Conversation** window expand, showing the sharing control pane

1 Click **Open** to view a received web page.



The Personal Communicator Client opens your default web browser application and displays the received page. The Personal Communicator Client also displays a dialog box where you can choose whether or not the Personal Communicator Client automatically displays future received web pushes from the far end.

2 Click **OK** to have the Personal Communicator Client automatically display future received web pushes from this remote party.

Tip: Nortel recommends that you allow the Personal Communicator Client to automatically view received web pages, especially if the remote party is using the Personal Communicator Client's co-browsing feature. This way you won't have to click **Open** for every web page you receive.

Co-browsing web pages

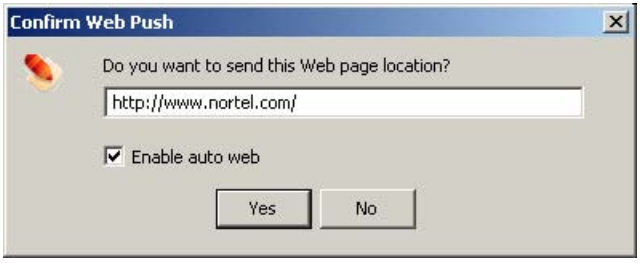
During a web push, if the Personal Communicator Client is able to communicate with a compatible running web browser application, you have the option to set the Personal Communicator Client to automatically push any subsequent web pages you view to the remote computer.

Tip: Co-browsing is not available when using the Personal Communicator Client with Converged Desktop service or when pushing a web page to a user not on an active call.

To use Co-browsing, you must have a compatible browser application running. Nortel recommends Internet Explorer version 6.0 and above or Firefox version 2.0 and above.

To activate co-browsing when pushing a web page,

1 Select the **Enable auto web** push check box from the Confirm Web Push window.



The Personal Communicator Client automatically sends all subsequent pages you view to the other computer.

While co-browsing (auto web push) is active, the **Send Web Page** button flashes in the sharing control pane for the **Conversation** window.

While co-browsing, keep in mind that when you click on a new web site (another URL), the user on the remote PC is also able to see this web site (the new URL). However, if you select a link and go to another page on the same URL, the user on the remote PC does not see the updated page.

If the Personal Communicator Client receives a web page while auto web push is active, it deactivates auto web pushing. This prevents two Personal Communicator Client systems from getting into a web-pushing loop with each other.

Transferring files

The Personal Communicator Client lets you send (and receive) files to (and from) another user's Personal Communicator Client. Once a conversation has been successfully started, two users can exchange files using the Send File sharing tool.

Sending files

To send a file,

1 Select the **Send File** option.

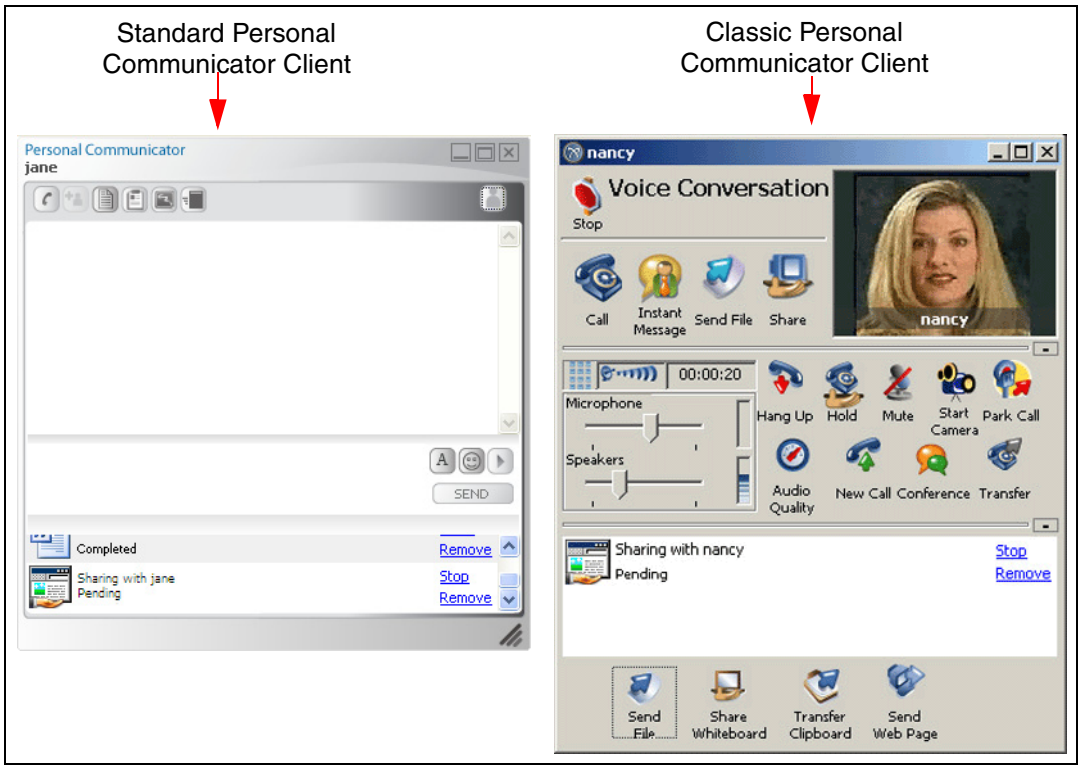
In this interface	Click
Standard Personal Communicator Client interface	**Send File** under the **Call List** area.
Classic Personal Communicator Client interface	**Send File** from the sharing control pane.

The Personal Communicator Client displays a file selection dialog window where you can select a file to send to the remote computer.

2 Using the file dialog, select a file and click **Open** to initiate the file transfer.

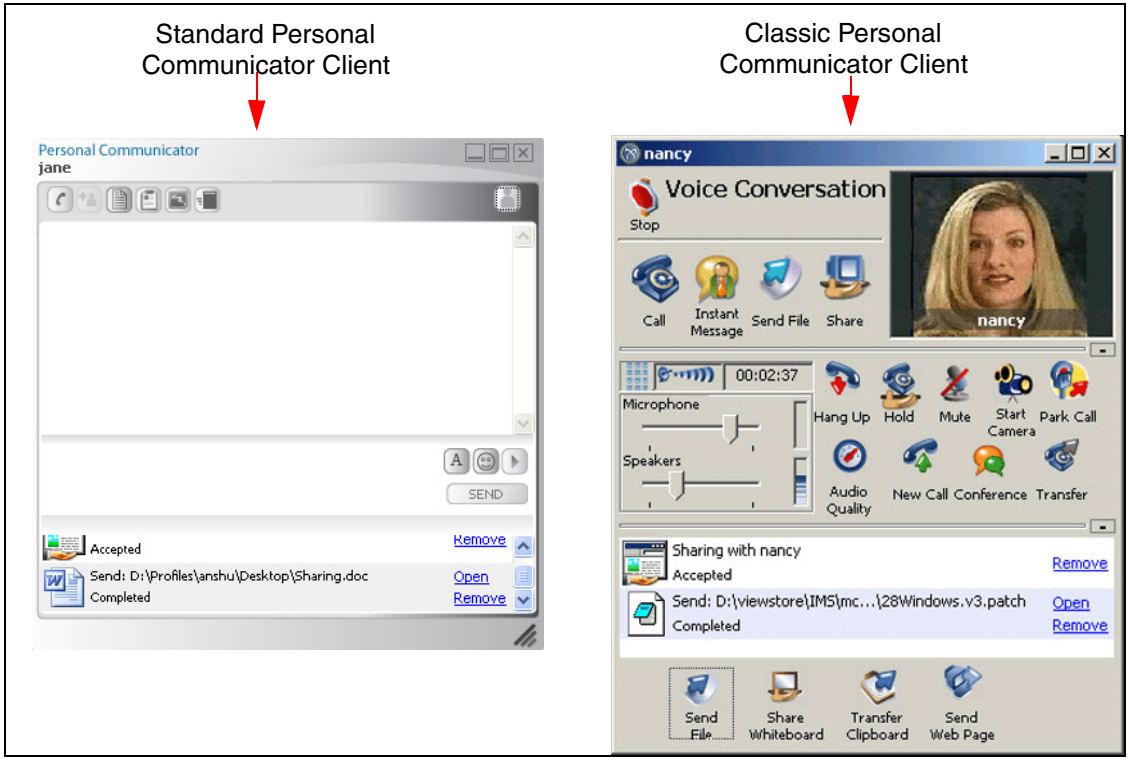
Tip: You can also send a file through the drag-and-drop method. Click the file you wish to transfer on your desktop. Drag the file and drop it in the Conversation window or an Instant message window. This automatically initiates a file transfer.

The Personal Communicator Client contacts the remote party and waits for the file send request to be accepted or rejected. While waiting for remote party acceptance, the file transfer appears in the pending state.



Tip: Before the far end has accepted or rejected your file send request, you can cancel the file send action. Click **Stop** to cancel the file send.

If the remote party accepts the file transfer, the file is sent, and the sharing window indicates that the file has been sent successfully.



If the remote party rejects the file transfer, the file is not sent, and the sharing window indicates that the file transfer has failed.

Receiving files

When the remote party requests a file transfer to you, the Personal Communicator Client displays the file transfer request in the pending state.

To accept the file, click **Accept** in the sharing window. The file transfers to your computer. The sharing window displays the **Accepted** message when the file transfer is complete.

Tip: You do not receive the Accept option in the sharing window, if you have configured the user sending the file as a Trusted User.

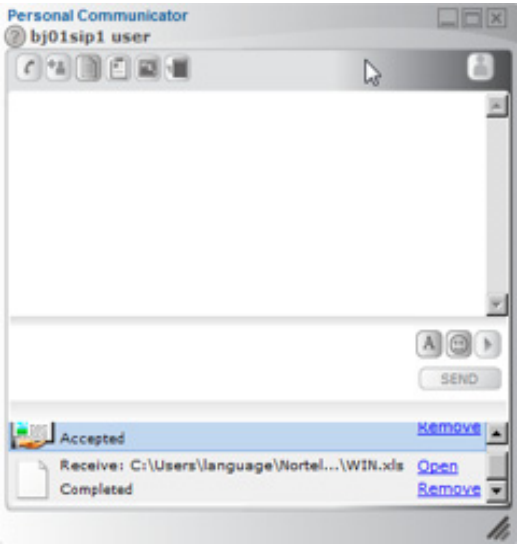
To reject the file, click **Reject** in the sharing window. The sharing window displays the **Failed** message, indicating the file transfer has not been transferred.

Accessing received files

After a file has been successfully received, you can open an Internet Explorer window to access the transferred file. The Personal Communicator Client provides quick access to the received file.

To locate the file, click **Open** in the sharing control pane.

Standard Personal Communicator Client



Classic Personal Communicator Client

The Personal Communicator Client opens an Internet Explorer window directory to its incoming file directory.

Sharing a whiteboard

The Personal Communicator Client lets you and another user share a common drawing window. The **Share Whiteboard** tool lets both users draw to the window and see the results of the shared whiteboard.

Sending a share whiteboard request

To start sharing a whiteboard,

1 Select the sharing option.

In this interface	Click
Standard Personal Communicator Client	**More commands, Share whiteboard** under the **Call List** area.
Classic Personal Communicator Client	Click **Sharing** in the **Conversation** window for the call.

2 Select **Share Whiteboard**.

The Personal Communicator Client contacts the remote party and waits for the share whiteboard request to be accepted or rejected. While waiting for remote party acceptance, the share whiteboard request is in the pending state.

Tip: Before the far end has accepted or rejected your share whiteboard request, you can cancel the share whiteboard request. Click **Stop** to cancel the share whiteboard request.

If the remote party accepts the share whiteboard request, the whiteboard application is started, and the sharing window indicates that the whiteboard has been opened.

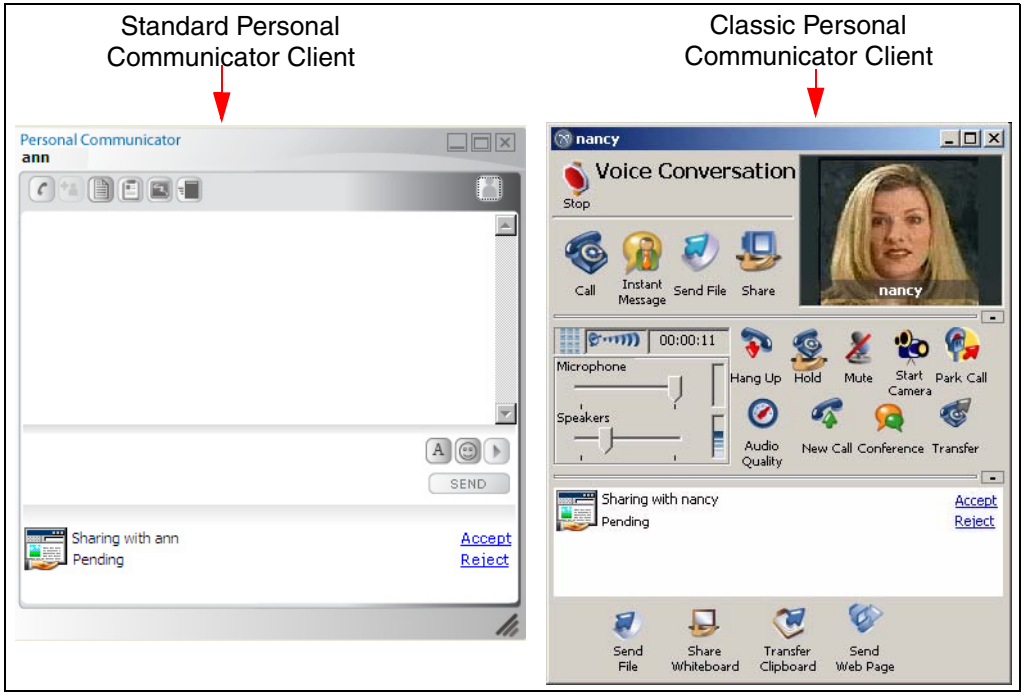
If the remote party rejects the share whiteboard request, the whiteboard application is not started, and the sharing window indicates that the file transfer has failed.

Receiving a share whiteboard request

If the remote party initiates a **Share Whiteboard** command, the following window appears depending upon your interface.

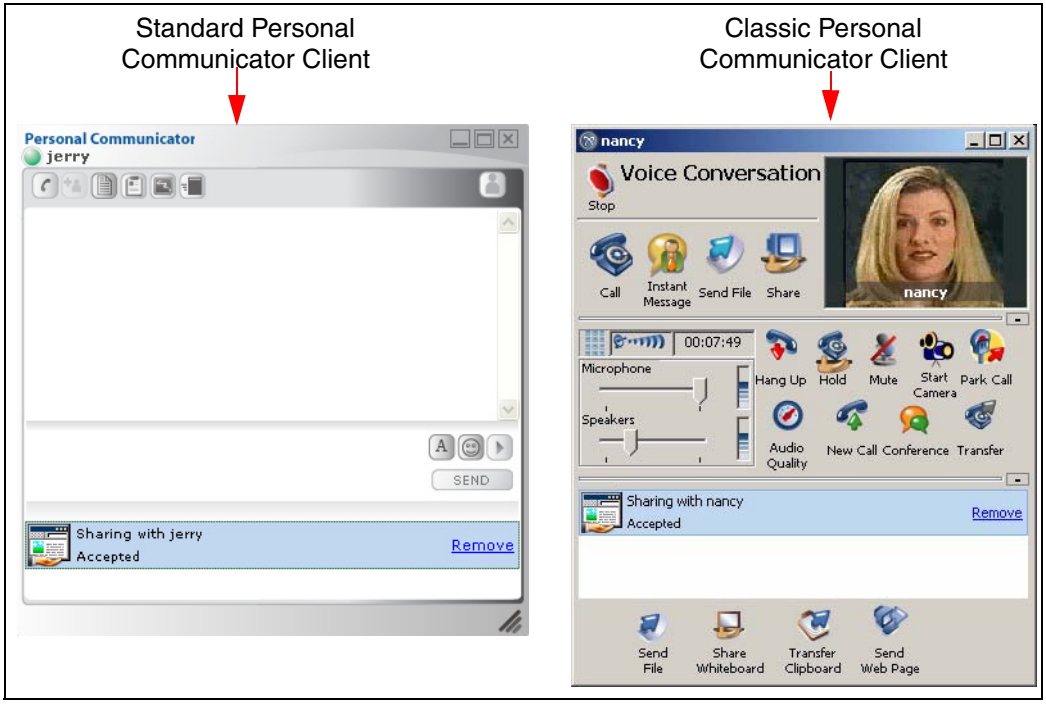
In this interface	You see
Standard Personal Communicator Client	a sharing window
Classic Personal Communicator Client	the **Conversation** window expand, showing you the sharing control pane

The window displays the share whiteboard request in a pending state.



To accept the share whiteboard request, click **Accept** in the sharing control pane.

The share whiteboard application is started. The Sharing control pane display indicates that the shared whiteboard request was accepted.



To reject the share whiteboard request, click **Reject** from the sharing window. The whiteboard request is rejected, and the window indicates that the shared whiteboard request was rejected.

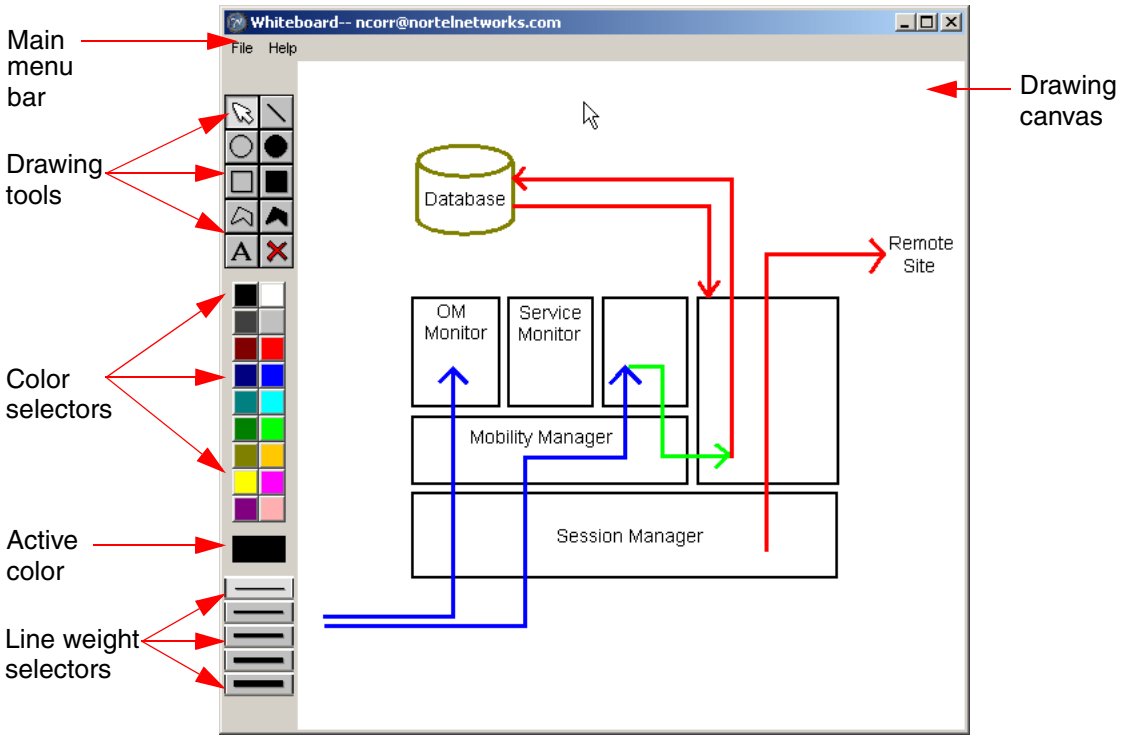
Using the whiteboard

After the remote party has accepted your share whiteboard request, the Personal Communicator Client displays the **Whiteboard** window.

Keep the following in mind when using the whiteboard workspace:

- Use the object drawing tools—circle, square, polygon—to create shapes and lines.
- The drawings are vector drawings, not bitmaps. This means you can move, edit, or delete the objects you create with these tools, rather than manipulate them pixel by pixel (as you do with paint-type programs).

- Use the color selectors to choose colors for drawing objects and text.
- Use the line weight selectors to choose the thickness of drawing lines.
- Both you and the other user can edit the whiteboard drawing space. Both of you can view the results immediately.



Saving whiteboard drawings

To save whiteboard drawings,

1. Select **File, Save** from the menu on the **Whiteboard** window.
2. Select a location and enter a filename in the **Save Whiteboard** window.
3. Click **Save**.

   The Personal Communicator Client saves the file to the location and filename you specified.

Restoring whiteboard drawings

To restore whiteboard drawings,

1. Select **File, Restore** from the menu on the **Whiteboard** window.
2. Browse to select the previously saved whiteboard drawing.
3. Click **Open**.

   The **Whiteboard** window updates to display the saved whiteboard drawing.

Transferring the clipboard

The Personal Communicator Client lets you send (and receive) Windows clipboard data to (and from) another user's Personal Communicator Client. You can share clips of text, photos, drawings, Web bookmarks, email address books, and other clipboard contents. Once a conversation has been successfully started, two users can send Windows clipboard data using the **Transfer Clipboard** sharing tool.

Certain items copied to your clipboard file, such as file icons, cannot be copied and sent using the **Transfer Clipboard** sharing tool. Use the **Send File** sharing tool to send these items.

Placing the content in the Windows clipboard

Before you are able to transfer clipboard data to the remote user, you must place some data into the system clipboard.

To put content in the clipboard,

1. Open the application and file containing the desired content you want to transfer.
2. Select and highlight the portion of the file you wish to exchange through the clipboard.

3 Use that application's **Copy** function to copy the content to the system clipboard.

Tip: For most applications, the keyboard shortcut command is **<CTRL-C>** and the menu command is **Edit, Copy**. The selected contents are automatically placed in your Windows system clipboard.

Sending clipboard data

Once the system clipboard contains data, you can transfer it to the remote user.

To send clipboard data,

1 Select the sharing option.

In this interface	Click
Standard Personal Communicator Client interface	**More commands** under the **Call List** area.
Classic Personal Communicator Client interface	Click **Sharing** in the **Conversation** window for the call.

2 Select **Transfer Clipboard.**

The Personal Communicator Client contacts the remote party and waits for the transfer clipboard request to be accepted or rejected. While waiting for remote party acceptance, the transfer clipboard request is in the pending state.

Tip: Before the far end has accepted or rejected your transfer clipboard request, you have the ability to cancel the transfer clipboard request. Click **Stop** to cancel the transfer clipboard request.

If the remote party accepts the transfer clipboard request, the clipboard data is sent, and the sharing window indicates that the data transfer has been completed successfully.

If the remote party rejects the transfer clipboard request, the clipboard data is not sent, and the sharing window indicates that the data transfer request was rejected.

Receiving a transfer clipboard request

If the remote party initiates a **Transfer Clipboard** command, the following window appears depending upon your interface.

In this interface	You see
Standard Personal Communicator Client	a sharing window
Classic Personal Communicator Client	the **Conversation** window expand, showing you the sharing control pane

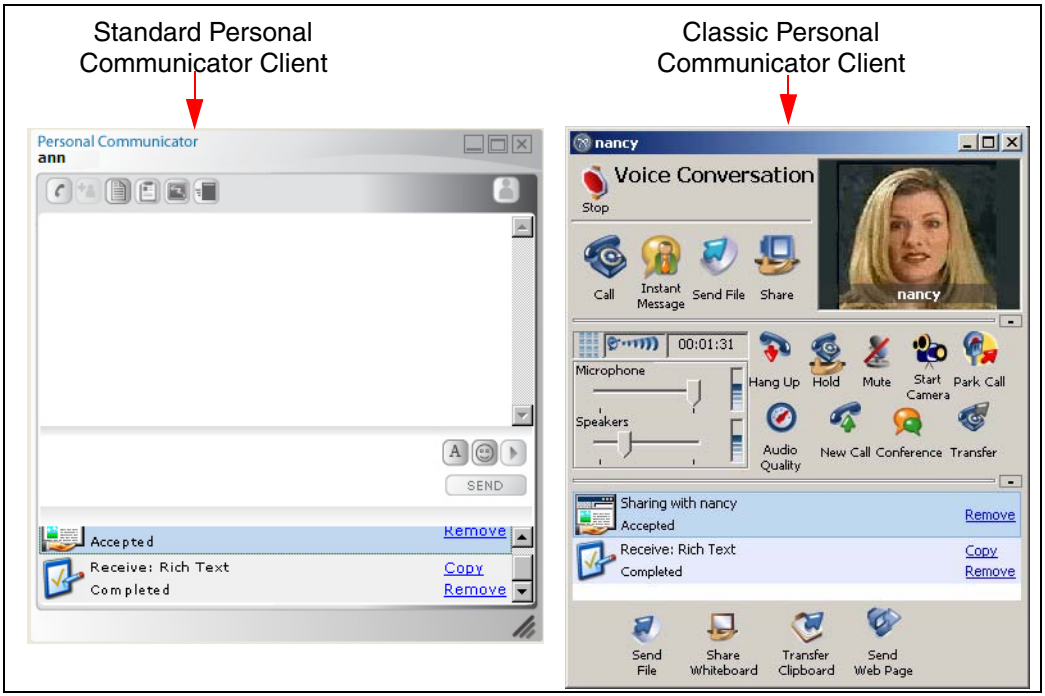
The window displays the clipboard transfer request in a pending state.

To reject the clipboard data, click **Reject** in the sharing control pane.

The sharing window indicates that the data transfer has not been transferred to your system clipboard.

To use clipboard data received from the other client, click **Accept** in the sharing window.

The data is transferred into your Personal Communicator Client application. The sharing window displays when the data transfer is complete. It also indicates what type of data was transferred.



To put the transferred data into the system clipboard, click **Copy**.

Using or saving the received clipboard data

To use or save the transferred clipboard data,

1. Open the Windows application(s) in which you want to use the clipboard data.
2. Use the **Paste** function of that application to paste the data from the system clipboard into the application.

Tip: For most applications, the keyboard shortcut command for pasting clipboard data is **<CTRL-V>** and the menu command is **Edit, Paste**.

3 Edit and save your data in the Windows application.

Tip: The data format selected for the clipboard transfer determines how the clipboard data appears when it is finally pasted into an application. For example, clipboard data transferred in Rich Text Format (RTF) and pasted into an application that understands this format (Microsoft Word or Windows WordPad) retains formatting even when shared through the clipboard tool.

Chapter 6
Using the IM chat room

Topics in this section:

- "Understanding IM chat room" on page 167
- "Types of chat room" on page 168
- "Creating a chat room" on page 168
- "Joining a chat room" on page 170
- "Chatting in a room" on page 171
- "Leaving a chat room" on page 175

Understanding IM chat room

From your Personal Communicator Client, you can create or join a chat room to send instant messages to multiple users simultaneously. You can create a new chat room inviting others to join it, or you can join an existing chat room. You can also browse online for chat rooms and join multiple chat rooms simultaneously with a separate window for each chat room.

The ability to create and join chat rooms from the Personal Communicator Client depends on whether the IM chat room service is assigned to you. If you do not have support for creating and joining chat rooms, then you will not be able to use the IM chat room feature.

Types of chat room

The Personal Communicator Client provides three types of chat rooms for the user.

Chat room	Description
Public chat room	A public chat room is open to all users. Anyone can join this type of chat room from the Personal Communicator Client. You can view a list of public chat rooms from your Select Chat Room window.
Public with password	A public chat room with password is open to those users who have the password to join that particular chat room. Public chat rooms with passwords are also visible from your Select Chat Room window.
Private chat room	A private chat room is only open to selected users. You cannot view a list of private chat rooms from your Select Chat Room window. You need an invitation to be able to join a private chat room.

Creating a chat room

To create a chat room,

1 Open the **Select Chat Room** window.

In this interface	Select
Standard Personal Communicator Client	**More, Chat Session** from the Call area
Classic Personal Communicator Client	• **Tools, Start Chat** from the main menu • **Chat** button on the main GUI

2 Click **Create chat room**.

The Create Chat Room window appears.

3 Type the information required for a new chat room.

Field	Description
Room Name	Type a name of the chat room.
Topic	Specify the topic of the chat room.

Field	Description
Room Type	Specify whether the chat room is private, public, or with password.
Password	If the Room Type is password protected, then type the password. Remember, you if selected private or public in the **Room Type** field, then this field is grayed out.
Confirm	Confirm the password you typed in the **Password** field.

4 Select the names to invite in the chat room.

In this interface	Select the names from
Standard Personal Communicator Client	**Personal Contacts, Recent,** or **Directory** tabs
Classic Personal Communicator Client	**Friends, Recent,** or **Directory** buttons

5 Click **Add.**

The names you selected appear in the **Participants** field.

Tip: Click **Remove** to delete names from the **Participants** list.

6 Type the SIP address of other names not in your contact list.

In this interface	Type the SIP address in
Standard Personal Communicator Client	the field beside the **Add** button
Classic Personal Communicator Client	the **Invite other** field

7 Click **Add.**

The name you typed appears in the **Participants** list.

8 Click **Create.**

You will be placed into the chat room, and each user in the **Invite Participants** list will receive a chat invitation.

Joining a chat room

To join a chat room,

1 Open the **Select Chat Room** window.

In this interface	Select
Standard Personal Communicator Client	**More, Chat Session** from the Call area
Classic Personal Communicator Client	• **Tools, Start Chat** from the main menu • **Chat** button on the main GUI

2 From the **Select Chat Room** window, select the chat room you wish to join.

The **Select Chat Room** window only lists public or public chat rooms with password in the **Room List** pane.

Tip: The chat rooms that are password protected have a lock icon next to their names.

3 Click **Join chat room**.

4 If the chat room is password protected, enter your password in the **Please input password** window.

5 Enter the password and click **OK**.

Tip: If you use the Classic Personal Communicator Client interface, then click **Refresh** to retrieve the latest chat room information from the Room List pane. This option is unavailable in the Standard Personal Communicator Client interface.

Chatting in a room

Once you join a chat room, the chat room window appears.

The table shows the status and button information that you see in the chat room window.

Chat room window	Description	Available in this interface
Chat room name, room type, and the number of participants	The title bar of the Topic window displays the • name of the chat room. • type of chat room (private, public, or public with password). • number of participants in the chat room.	Classic Personal Communicator Client
Chat room name	Displays the name of the chat room in the Welcome statement.	Standard and Classic Personal Communicator Client
Topic	Displays the topic of the chat room.	Standard and Classic Personal Communicator Client
Send to:	Shows the list of participants in the chat room. Your name within this window is dimmed. The default setting in this window is **All participants**, which means all participants in the chat room can see your instant messages.	Standard and Classic Personal Communicator Client
Save	Saves your chat.	Standard and Classic Personal Communicator Client
Timestamp	Shows the date and time of your chat.	Standard and Classic Personal Communicator Client

Chat room window	Description	Available in this interface
Print	Prints your chat.	Standard and Classic Personal Communicator Client
Font	Changes your font type and font size.	Standard and Classic Personal Communicator Client
Clear	Clears your chat in the Conversation window.	Standard and Classic Personal Communicator Client
Emoticons	Allows you to add emoticons to your chat.	Standard and Classic Personal Communicator Client
Invite	Allows you to invite your contacts into the chat room.	Standard and Classic Personal Communicator Client
Topic	Allows you to set or change the chat room topic.	Standard and Classic Personal Communicator Client

Once you join a chat room, you can send messages to all participants or to just one participant. You can also invite others to join the chat room.

Tip: If you use the Classic Personal Communicator Client interface, you can change the topic of a particular chat room.

Sending a message to all participants

To send an instant message to all participants in the chat room,

1 Select **All Participants** in the **Send to** window.

2 Type your message and click **Send**.

This sends your message to all participants in the chat room.

Sending a private message

To send a private message to a specific participant in the chat room,

1 Select the name of the participant from the Send to window.

2 Type your message and click **Send**.

Changing the topic

To change the topic in the chat room,

1 Select **Topic**. The Set Topic window appears.

2 Type the topic you wish to discuss and click **OK**.

Inviting a friend into a chat room

To invite a friend into a chat room,

1 Select the invitation button.

In this interface	Select
Standard Personal Communicator Client	**Invite user** button from the chat room window
Classic Personal Communicator Client	**Invite** button from the Topic window

The Invite Participants window appears.

2 Select the name you wish to invite into a chatroom and click **Add**.

In this interface	Select names from
Standard Personal Communicator Client	**Personal Contacts, Recent,** or **Directory** tabs
Classic Personal Communicator Client	**Friends, Recent,** or **Directory** buttons

The name you selected appears in the **Participants** field.

3 Click **Invite**.

Receiving an invitation to join a chat room

If you are invited to join a chat room, you have the choice to accept, decline, or ignore the invitation from the Chat Invitation window.

Chat Invitation
Cindy Jones has invited you to join the "MCSDocTeam" chat room.
Receive time: Mon May 03 12:25:57 CDT 2004
Accept
Decline
Ignore

1 Select one of the following options.

Click	To
Accept	join the chat room Accepting an invitation notifies all participants in the chat room that you have joined the chat room.
Decline or Decline with reason	reject the invitation Declining the invitation notifies your friend that you declined the invitation.
Ignore	ignore the invitation. When you select this option, the request for invitation times out after a certain time. When the request times out, the person who sent you the invitation receives the following message: “User did not respond to your invitation.”

Tip: Remember, an invitation to a friend may fail if the chat room reaches its capacity limit. An invitation may also fail if the user name of your friend is invalid.

Leaving a chat room

To leave a chat room, select one of the options.

If you use this interface	Then
Standard Personal Communicator Client	Close the chat room window.
Classic Personal Communicator Client	• Select **Stop** from the Topic window. • Close the chat room window.

All other participants are notified that you have left the chat room.

Chapter 7
Advanced set-up

Topics in this section:

- "Configuring your preferences" on page 177
- "Using the audio wizard to configure audio volume" on page 228
- "Configuring multiple profiles" on page 234
- "Automatic software upgrades" on page 236
- "Removal procedures" on page 238

Configuring your preferences

The **Tools, Preferences** menu allows you to configure the following settings:

- user profile
- connection speed
- active network proxy server
- audio devices
- audio
- sounds
- video
- voicemail
- Nortel IP Phone connectivity
- file exchange
- presence
- instant messaging (This option is available only if the instant messaging service is assigned to you.)
- display

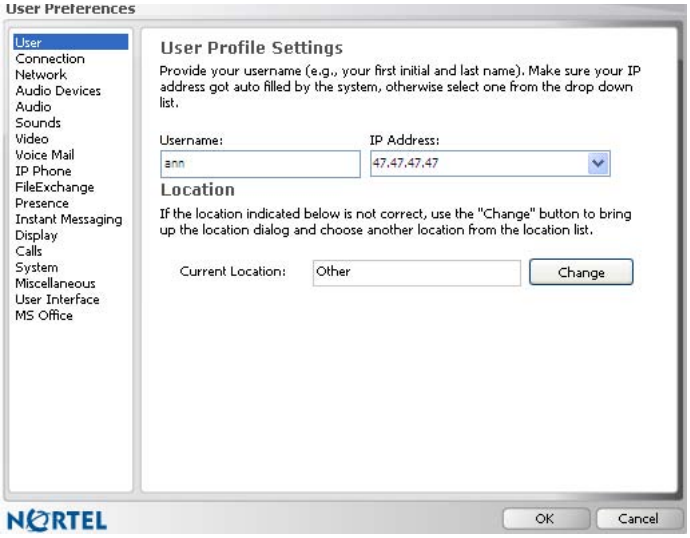
- calls
- system
- miscellaneous
- user interface
- MS office

You may not be able to change some settings because some of these services may not be assigned to you, pre-configured by your service provider, or not available for your configuration. For example, Converged Desktop users cannot edit video settings. Users with Personal Communicator Client without voice capability do not have audio connection, video, voicemail, or IP Phones settings available to them.

Setting up your user profile

To set up your user profile,

1 Select **Tools, Preferences, User** to display a window where you can identify yourself.



2 Enter your **Username**.

This is the same name you use when accessing the Personal Agent. Usernames are unique; your username cannot be the same as any other username in your network domain.

Your service provider or system administrator assigns your username.

Tip: The Personal Communicator Client enables you to define multiple profiles. Each user profile you define has a completely separate set of preferences and configuration data. For more information, see "Configuring multiple profiles" on page 234.

3 Select your **IP Address**, if different from the default IP address the Personal Communicator Client detected from the Windows networking subsystem. If your computer has multiple IP addresses assigned to it, select the appropriate IP address from the drop-down list. If public network and private network IP addresses are available, use the public IP address.

4 Click **Change** if you wish to change your current location information.

5 Select your location.

Caution: You must provide the correct location information on your Personal Communicator Client; otherwise, some services, such as emergency and conferencing services, may not work properly. For example, the location you choose determines where you are during an emergency. If you choose **Other** as your default location, and you have to make an emergency call, the emergency call may route to the incorrect Public Safety Answering Point (PSAP).

6 Click **OK**.

If you choose **Other** for location, the following warning box appears indicating that, in case of an emergency, your physical location information will be unavailable.

Default Location Selected
Your location is set to a default value. This selection may affect emergency services. You may reset your location at any time by selecting the change location button on the User tab in the Preferences or by clicking the location on the main GUI.
OK
Don't show me this message again

7 Check **Don't show me this message again** to prevent this warning box from appearing when you log on to the Personal Communicator Client.

8 Click **OK**.

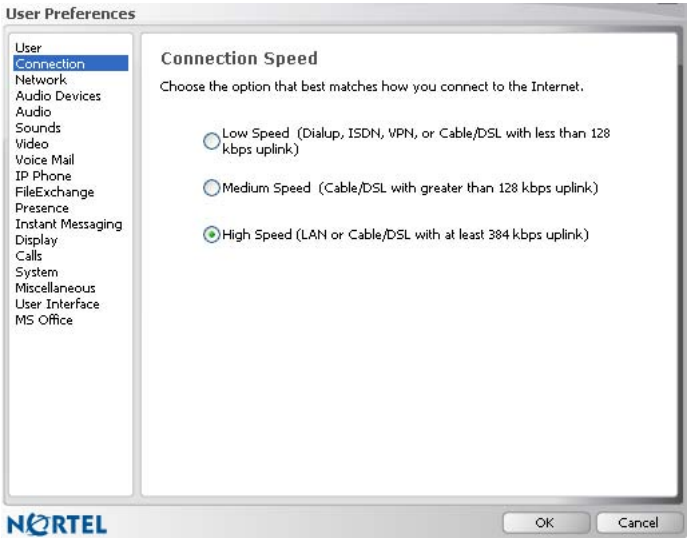
Setting your connection speed

The Connection preferences allow you to select the connection speed to the Internet.

Tip: This option is only available if your Personal Communicator Client is enabled for voice.

To set your connection speed,

1 Select **Tools, Preferences, Connection** to display the connection speed window.



2 Select the **Connection Speed** of your computer's connection to the network:

— low speed (Dialup, ISDN, VPN, or Cable/DSL with less than 128 kbit/s uplink)

— medium speed (Cable, DSL with greater than 128 kbit/s uplink)

— high speed (LAN or Cable/DSL with at least 384 kbit/s uplink)

The Personal Communicator Client selects the appropriate voice and video settings based on this connection speed. If you enter a connection speed higher than your actual connection, the application may overload your PC with incoming voice packets. Check with your system administrator if you are not sure what type of connection you have.

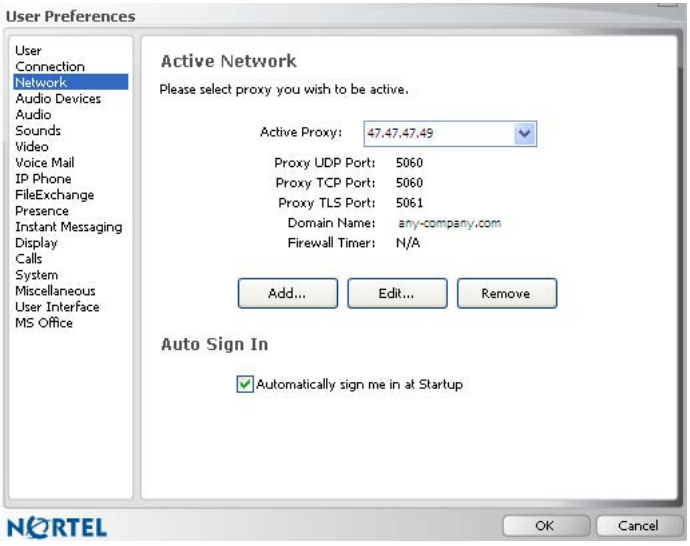
3 Click **OK** to save your changes or **Cancel** to exit without saving.

Defining network settings

Network preferences allow you to customize your active proxy and to select whether or not to automatically connect to the active proxy when the Personal Communicator Client launches.

Specify the active proxy

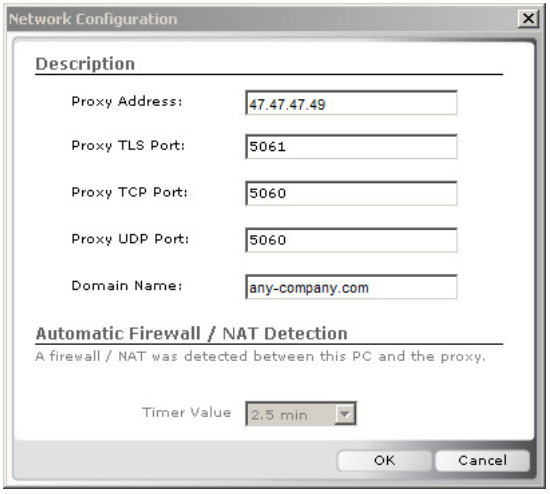
1 Select **Tools, Preferences, Network** to display the Network configuration window. Your active proxy server IP address appears.



2 Select your proxy server in the Active Proxy list.

3 Click **Edit**.

The Network Configuration window displays your proxy address, port, domain name, and automatic firewall/NAT detection status along with the Timer Value.



4 Click **OK** to save if you made any active proxy changes or **Cancel** to exit without saving.

Specifying automatic sign in to the active proxy

1 Select **Automatically sign me in at Startup** if you want the Personal Communicator Client to automatically connect to the proxy server when you start the program.

2 Click **OK** to save your changes or **Cancel** to exit without saving.

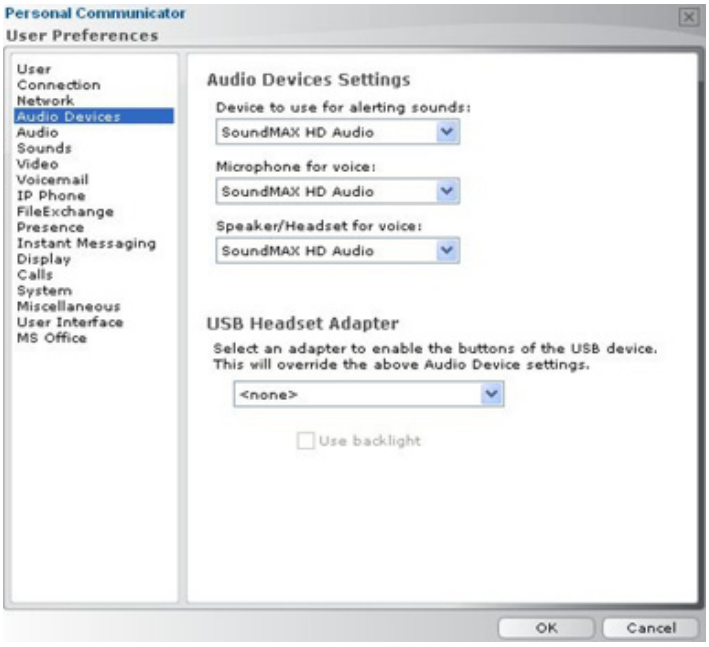
Selecting audio devices

If your PC has more than one audio device installed, you can select the audio device for alerting sounds and voice. For example, you can select your PC speakers to alert you to incoming calls and IMs and select your USB Audio Adapter for voice and audio.

Tip: To set up your microphone or speaker/headset for voice and your USB Audio Adapter for voice and audio, your Personal Communicator Client must have voice enabled.

The Nortel-recommended USB adapter (with or without a headset) provides one-touch access to answer and release calls as well as to control audio. This procedure has been verified with the Nortel USB keypad adapter and headset. Other products may not retain the settings as described.

1 Select **Tools**, **Preferences**, **Audio Devices**.



2 Select an audio device from the drop-down lists **Device to use for alerting sounds**, **Microphone for voice**, and **Speaker/Headset for voice**. (These settings are optional.)

3 In the **USB Headset Adapter** area, choose an adapter from the drop-down list. If a non-supported adapter is chosen, a warning message appears to let you know that the selected adapter is not supported but it might work.

Tip: The backlight option turns on lamps in the Nortel-recommended USB keypad adapter. You can disable the backlight option if you desire.

4 Click **OK**.

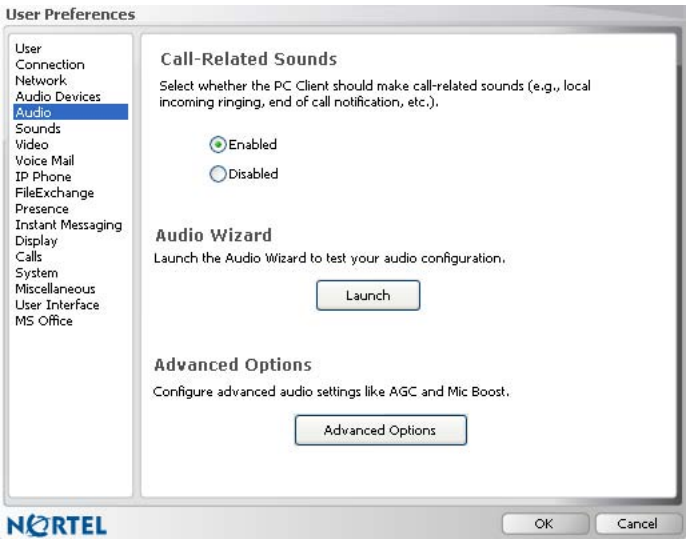
Setting up audio preferences

Audio preferences allow you to customize Personal Communicator Client audio settings.

These settings are not available to users who have Personal Communicator Client with Converged Desktop service or who have Personal Communicator Client with no voice capability.

Specifying call-related sound effects

1 Select **Tools, Preferences, Audio** to display the Audio settings window.



2 Select whether the Personal Communicator Client generates call-related sound effects (for example, local incoming ringing or end of call notification).

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Accessing the Audio Wizard

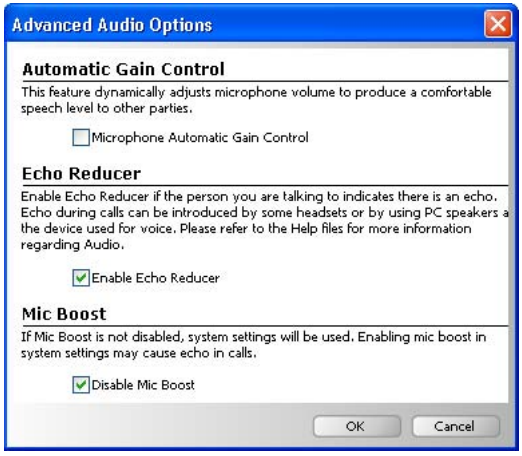
1 Select **Tools, Preferences, Audio** to display the Audio settings window.

2 Click **Launch** to start the Audio Wizard.

For complete information about the Audio Wizard, see "Using the audio wizard to configure audio volume" on page 228.

Specifying advanced audio options

1 To specify advanced options for Automatic Gain Control, Echo Reducer, and Mic Boost, click **Advanced Options** to display the Advanced Audio Options dialog box.


Advanced Audio Options
Automatic Gain Control
This feature dynamically adjusts microphone volume to produce a comfortable speech level to other parties.
Microphone Automatic Gain Control
Echo Reducer
Enable Echo Reducer if the person you are talking to indicates there is an echo. Echo during calls can be introduced by some headsets or by using PC speakers a the device used for voice. Please refer to the Help files for more information regarding Audio.
Enable Echo Reducer
Mic Boost
If Mic Boost is not disabled, system settings will be used. Enabling mic boost in system settings may cause echo in calls.
Disable Mic Boost
OK
Cancel

2 Enable **Automatic Gain Control** if other parties on a call complain that your speech is too loud or soft. To enable Automatic Gain Control if you are already on a call, place the call on Hold, select the Automatic Gain Control check box, and then take the call off hold. You can select the Automatic Gain Control check box any time while not in a call for all subsequent calls to receive this treatment.

Enabling Automatic Gain Control will use more of your system resources (memory and CPU processing). Do not select this option unless necessary.

3 Select whether the Personal Communicator Client activates its **Echo Reducer** capabilities to remove echo while on a call.

If you are using a microphone and separate speakers (internal to your PC or externally connected), then select the **Enable Echo Reducer** check box.

If you are using a USB headset (best) or analog headset that plugs into your PC's sound card, and other parties on a call complain about echo, then see "Echo" on page 245, in Chapter 8, "Troubleshooting" on page 243, before selecting the **Enable Echo Reducer** check box. Troubleshooting echo problems include

— checking whether Mic Boost is enabled

— adjusting the volume controls for both input (the microphone of the headset) and output (the headset's speakers)

— adjusting the Mixed Input options

To enable the Echo Reducer if you are already on a call, place the call on **Hold**, select the **Enable Echo Reducer** check box, and then take the call off hold. You can select the **Enable Echo Reducer** check box any time while not in a call for all subsequent calls to receive this treatment.

Enabling the Echo Reducer will use more of your system resources (memory and CPU processing). Do not select this option unless necessary.

4 Mic Boost is a Windows OS setting. The Personal Communicator Client audio engine works best with Mic Boost disabled (otherwise, calls may have echo). When Personal Communicator Client option **Disable Mic Boost** is checked (the default) when you launch the Personal Communicator Client, it disables Mic Boost in the OS. After that, Mic Boost remains disabled until you manually re-enable it from the Windows Control pane.

If the Personal Communicator Client disables Mic Boost, then the Mic Boost is also disabled for all other applications. If you prefer to keep Mic Boost enabled, un-check **Disable Mic Boost** so that the Personal Communicator Client does not disable the OS setting.

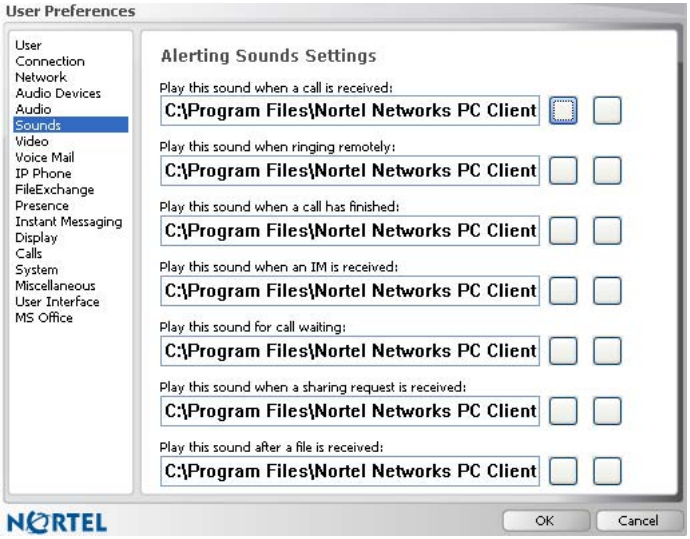
5 Click **OK** to save your changes or **Cancel** to exit without saving.

Selecting alerting sounds

You can change Alerting Sounds Settings by selecting different .wav files. Standard alerting sounds are stored as .wav files in the Personal Communicator Client installation directory. Ask your system administrator if other alerting sounds are available.

Tip: To access all sound settings, your Personal Communicator client must have voice enabled.

1 Select **Tools, Preferences, Sounds** to display the **Sounds** window.



2 Select .wav files for Alerting Sounds Settings. Click the "**...**" button and navigate to the location of the .wav files in your Personal Communicator Client directory.

Click the ">" button to listen to the .wav file after you have selected it.

3 Click **OK**.

Tip: If your Personal Communicator Client is not enabled for voice, then you do not have access to these Sounds settings: Play this sound when a call is received, Play this sound when ringing remotely, Play this sound when a call has finished, and Play this sound for call waiting.

Setting up video preferences (optional)

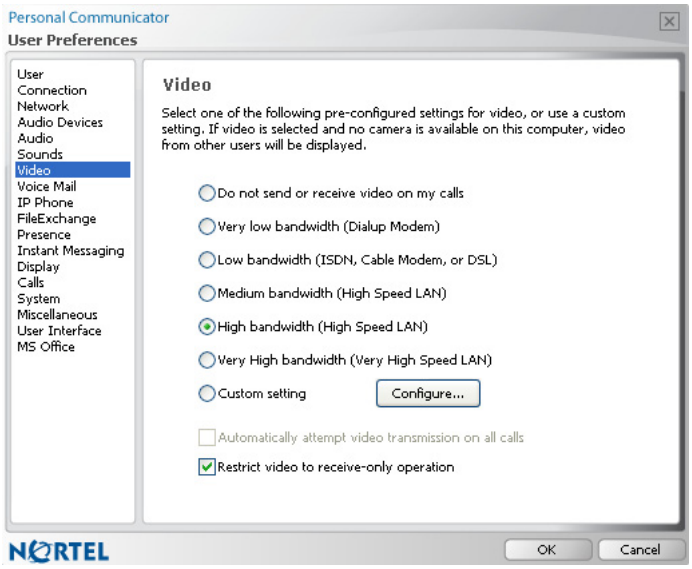
You can choose various video settings to suit your particular needs. The pre-configured values in the Video settings window apply to most users. An expert user may choose to configure custom settings.

Access to the video settings depends on whether this service is assigned to you. If you do not have video support, then you cannot alter the video settings. Remember to register before trying to alter these settings. Converged Desktop users do not have access to video.

Setting up video

To set up video,

1 Select **Tools, Preferences, Video** to display the Video settings window.



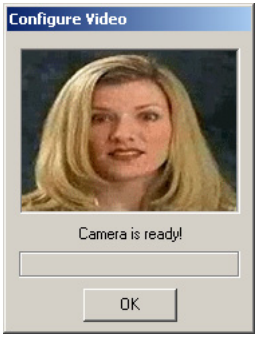
2 Select the video configuration that most closely meets your needs. The following table lists the video configuration settings.

Video setting	Description
Very low bandwidth	Enables video telephony over dialup. This configuration uses a small video window and produces a video bit rate around 10 kbit/s to 20 kbit/s for Nortel proprietary video and 10 kbit/s for H.263.
Low bandwidth	Enables video telephony over ISDN/DSL/Cable modem. This configuration uses a small video window and produces a video bit rate around 60 kbit/s to 120 kbit/s for Nortel proprietary video and 64 kbit/s for H.263.
Medium bandwidth	Enables video telephony in an office using a 10/100 Mbit/s LAN. This configuration uses a medium-sized video window and produces a video bit rate around 150 kbit/s to 300 kbit/s.
High bandwidth	Enables video telephony in an office using a 10/100 Mbit/s LAN. This configuration uses a large video window and produces a video bit rate around 400 to 800 kbit/s. This video is suitable for overhead projection.

Video setting	Description
Very high bandwidth	Enables video telephony in an office using a 10/100 Mbit/s LAN. This configuration uses a 640 x 480 video window and produces a video bit rate of 800 kbit/s.
Custom setting	Fine-tunes video performance.

The video bit rates listed for the pre-defined video configuration settings are approximate and may vary in actual use.

The first time you configure the video, the video camera is examined and verified for compatibility with the Personal Communicator Client. If the camera is compatible, a small window displaying video from the camera appears.



If the video camera is incompatible with the Personal Communicator Client, follow the on-screen directions to configure the camera.

If no video camera is attached to the PC when you configure video, a “No camera available” message appears the first time that you select a pre-defined video configuration setting. This message indicates that, although you cannot send video, you can still receive video.

3 Click **OK** to close the **Configure Video** window.

4 Click **OK** to save your changes or **Cancel** to exit without saving.

After the video camera has passed compatibility testing with the Personal Communicator Client, video can be sent and received on all calls to other video-enabled clients.

Disabling video transmission

To disable video transmission from your camera-equipped PC,

1. Select **Tools, Preferences, Video** to display the Video settings window.
2. Select the **Do not send or receive video on my calls** option to completely disable all video (incoming and outgoing).

   OR

   Select the **Restrict video to receive-only operation check box to allow other video-enabled clients to send you video while your** Personal Communicator Client **does not.**
3. Click **OK** to save your changes or **Cancel** to exit without saving.

Tip: Re-enable video by selecting one of the pre-defined video configuration settings or the custom video configuration setting.

If video has been enabled for all calls (either bi-directional or receive-only), video can be wholly disabled by selecting the **Do not send or receive video on my calls** setting.

Custom video configuration

Use custom video configuration with care. The combination of a large video image size, high-quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. Nortel encourages you to use one of the pre-defined video configurations for everyday use.

To customize your video configuration,

1. Select **Tools, Preferences, Video** to display the Video settings window.
2. Click **Configure** (or select **Custom setting** for the first time).

   The **Video Configuration** window appears. Advanced users can fine-tune their video settings from the **Video Configuration** window.

3 Adjust the custom video configuration. This custom Video configuration window has the following controls:

This custom Video configuration window has the following controls:

- **Video Driver** drop-down list identifies the driver that controls the camera. This is usually Microsoft WDM Image Capture, but some cameras provide a different one. Other items on this menu allow you to
  - — Disable video for all subsequent calls.
  - — Set video to receive-only operation on all subsequent calls.
  - — Reset the video configuration to its never-been-set-up default values.

- **Preferred Video Codec** drop-down list identifies which video CODEC is used. The available selections are
  - H.263 Codec
  - H.263+ Codec
  - H.264 Codec
  - MPEG4 Codec
  - DivX Codec

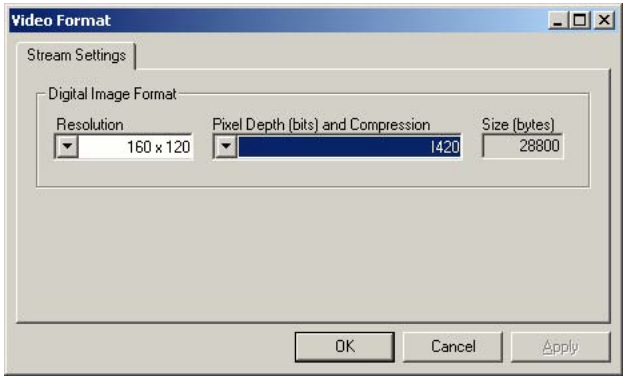
  Select **Client Video Codec by DivXNetworks, Inc.**, for Nortel proprietary video or one of the other available CODECs. The list of available CODECs depends on whether you have support for these CODECs and the raw image format that your video camera supports.
- **Codec Quality Settings** allow you to specify the image size and amount of detail in the transmitted video. Quality settings are
  - Very low bandwidth
  - Low bandwidth
  - Medium bandwidth
  - High bandwidth
  - Very high bandwidth
  - Custom

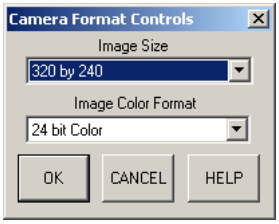
  High and very high quality transmits the most detailed images but at the expense of CPU and network bandwidth. Nortel strongly discourages the use of **Custom** quality settings unless you are highly knowledgeable.

  In a video call, the two clients negotiate to a common video quality that is acceptable to both, so delivered image quality may vary from call to call.

  For the DivX CODEC, no tool or formula allows you to compute the network bandwidth (in bits per second) for an arbitrary combination of video settings. However, network bandwidth increases with network bandwidth usage.
- **Config button** launches an advanced CODEC configuration dialog box. Defaults are used based on the Codec Quality Setting selected. To set up one of these CODECs as your preferred video selection, see "Selecting H.263 video CODEC" on page 196, "Selecting H.263+ video CODEC" on page 198, "Selecting H.264 video CODEC" on page 202, or "Selecting MPEG4 video CODEC" on page 204.

- The **Format** button produces another window that allows you to specify the size and internal organization of the video image. The layout of the **Video Format** window varies from camera to camera.





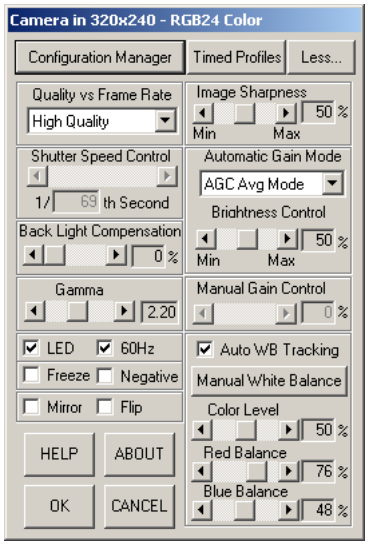
You can manipulate the following controls:

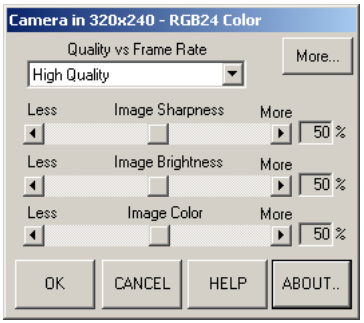
— **Resolution** (or **Image Size**) specifies the preferred size of the images that are transmitted during a video phone call. The following sizes are supported by the client: 160x120, 176x144, 320x240, 352x288, and 640x480.

In a video call, the two clients negotiate a video size acceptable to both, so video size may vary from call to call.

— **Pixel Depth and Compression** (or **Image Color Format**) specifies the organization of the video data captured by the camera. The Personal Communicator Client supports two, **RGB 24** and **I420**, although others may work. If **Video Codec** is unavailable under the **Preferred Video Codec** drop-down list, try to adjust this setting.

- The **Source** button produces another window that allows you to specify how the camera captures video. The layout of the **Video Source** window varies from camera to camera.





You can manipulate the following controls:

— Select which camera to use if more than one “Microsoft WDM” camera is attached to the PC.

— Adjust the camera’s color balance, brightness, contrast, and color saturation, among other settings.

- The **FPS** field allows you to specify the number of Frames Per Second that the Personal Communicator Client transmits. Higher numbers increase the fluidity of motion but at a cost of greater CPU and network bandwidth. A value of 15 produces quite an effective sense of motion.
- **Display Remote Video at** options allow you to specify the scaling factor on received video (**2x** means image dimensions multiplied by 2, **4x** means image dimensions multiplied by 4). Smaller screens disable these scaling factors as appropriate.

  Select **Emb** if you want video to be integrated into the **Conversation** window; otherwise, video appears in a separate **Video** window.

4 Click **OK** to save the changes or **Cancel** to exit without saving.

The **Video Configuration** window closes.

5 In the **Preferences** window, click **OK** to save your changes or **Cancel** to exit without saving.

Selecting H.263 video CODEC

The different formats that you can use to send and receive video depend on the support you have for different CODECs. Contact your system administrator for this information or check your **Personal Agent, Preferences**, **Services**, **Service package**.

To choose H.263 as the preferred video CODEC,

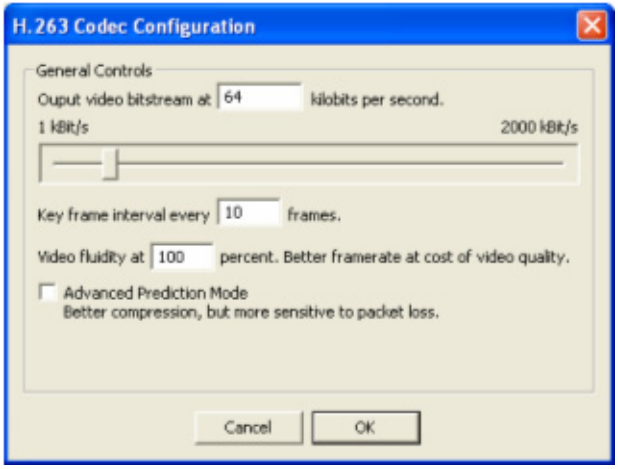
1 Click **Preferences**, **Video**, **Configure.**

The Video Configuration window appears**.**

2 Select **H.263 Codec** from the **Preferred Video Codec** drop-down list.

If your video camera does not support a video capture format that is usable by the H.263 CODEC, then the H.263 CODEC does not appear as a choice.

3 Select one of the **Codec Quality Settings** or click **Config**.


H.263 Codec Configuration
General Controls
Ouput video bitstream at 64 kilobits per second.
1 kBit/s
2000 kBit/s
Key frame interval every 10 frames.
Video fluidity at 100 percent. Better framerate at cost of video quality.
Advanced Prediction Mode
Better compression, but more sensitive to packet loss.
Cancel
OK

Use custom video configuration with care. The combination of a large video image size, high quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. Nortel encourages you to use one of the pre-defined video configurations for everyday use.

4 Use the guidelines in the table to adjust the custom video configuration.

H.263 custom video configuration	Description
Output video bitstream (rate)	This specifies the maximum bitrate that the encoder transmits, not including header information. Drag the slider or enter a value in the text box above it.
Key frame interval	This value allows you to change the interval of sending keyframes, which could reduce the bandwidth requirement at the cost of quality. The default value is 8 (medium, high, and very high quality settings), and you can specify values between 1 and 300.
Video fluidity	This value allows you to improve the frame rate of the video at the cost of quality. A lower value for Video Fluidity will produce more choppy video motion with a higher image quality for each frame of video. The default value is 100 (all quality settings).
Advanced Prediction Mode	This option tightens video compression, but the decoded video is more susceptible to artifacts due to packet loss.

5 Click **OK**.

Both clients in a call must support H.263 video CODEC in order to send and receive. However, if either client does not have H.263, then Nortel proprietary video is sent.

The following table lists the H.263 Codec Quality Settings default values.

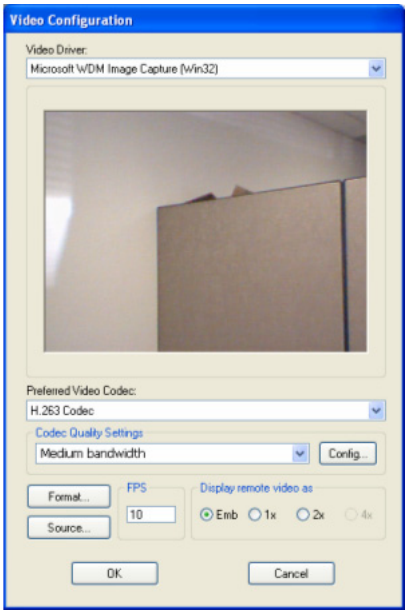
Setting	Very low	Low	Med	High	Very high
Bitstream	8	64	192	512	768
Key Frame Interval	10	10	8	8	8
Video Fluidity	100	100	100	100	100
Advanced Prediction Mode	Y	Y	Y	Y	Y

Selecting H.263+ video CODEC

The different formats that you can use to send and receive video depend on the support you have for different CODECs. Contact your system administrator for this information or check your **Personal Agent, Preferences**, **Services**, **Service package**.

To choose H.263+ as the preferred video CODEC,

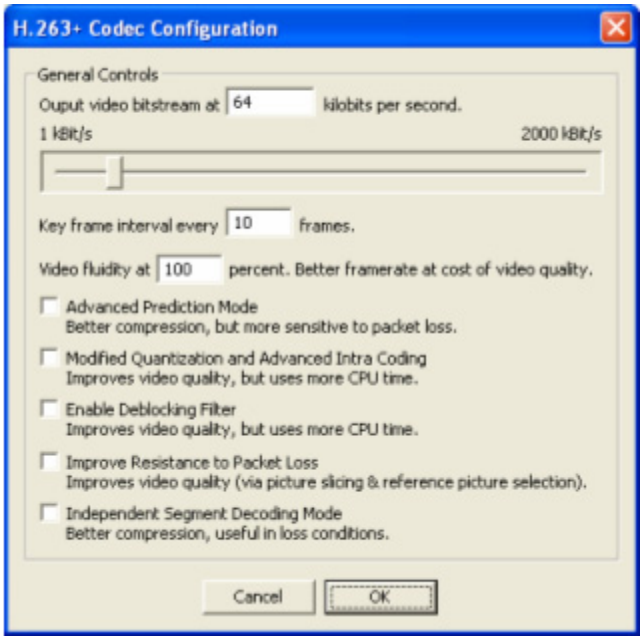
1 Click **Preferences**, **Video**, **Configure.** The Video Configuration window appears**.**



2 Select **H.263+ Codec** from the **Preferred Video Codec** drop-down list.

If your video camera does not support a video capture format that is usable by the H.263+ CODEC, then the H.263+ CODEC does not appear as a choice.

3 Select one of the **Codec Quality Settings** or click **Config**.


H.263+ Codec Configuration
General Controls
Ouput video bitstream at 64 kilobits per second.
1 kBit/s
2000 kBit/s
Key frame interval every 10 frames.
Video fluidity at 100 percent. Better framerate at cost of video quality.
Advanced Prediction Mode
Better compression, but more sensitive to packet loss.
Modified Quantization and Advanced Intra Coding
Improves video quality, but uses more CPU time.
Enable Deblocking Filter
Improves video quality, but uses more CPU time.
Improve Resistance to Packet Loss
Improves video quality (via picture slicing & reference picture selection).
Independent Segment Decoding Mode
Better compression, useful in loss conditions.
Cancel
OK

Use custom video configuration with care. The combination of a large video image size, high quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. Nortel encourages you to use one of the pre-defined video configurations for everyday use.

4 Use the guidelines in the table to adjust the custom video configuration.

H.263+ custom video configuration	Description
Output video bitstream (rate)	This specifies the maximum bitrate that the encoder transmits, not including header information. Drag the slider or enter a value in the text box above it.
Key frame interval	This value allows you to change the interval of sending keyframes, which could reduce the bandwidth requirement at the cost of quality. The default value is 8 (medium, high, and very high quality settings), and you can specify values between 1 and 300.

H.263+ custom video configuration	Description
Video fluidity	This value allows you to improve the frame rate of the video at the cost of quality. A lower value for Video Fluidity will produce more choppy video motion, with a higher image quality for each frame of video. The default value is 100 (all quality settings).
Advanced Prediction Mode	This option tightens video compression, but the decoded video is more susceptible to artifacts due to packet loss.
Modified Quantization and Advanced Intra Coding	This option improves video quality by improving compression and compression quality. Enabling this setting uses extra CPU processing time.
Enable Deblocking Filter	This setting, when enabled, filters out JPEG/MPEG-style blockiness to improve image quality, by filtering macroblock edges. Enabling this setting uses extra CPU processing time, though not very significantly on modern computer systems.
Improve Resistance to Packet Loss	This setting allows good decoding quality despite packet loss. This setting allows greatly improved resistance to packet loss, allowing up to 10-15% packet loss without noticeable video degradation.
Independent Segment Decoding Mode	This setting improves error resistance further by confining errors to slices and prevents them from corrupting an entire frame. This option is useful during packet loss conditions.

5 Click **OK**.

Both clients in a call must support H.263+ video CODEC in order to send and receive. However, if either client does not have H.263+ then Nortel proprietary video is sent.

The following table lists the H.263+ Codec Quality Settings default values.

Setting	Very Low	Low	Med	High	Very High
Bitstream	8	64	192	512	768
Key Frame Interval	10	10	8	8	8
Video Fluidity	100	100	100	100	100
Advanced Prediction Mode	Y	Y	Y	Y	Y
Modified Quantization and Advanced Intra Coding	Y	Y	Y	Y	Y

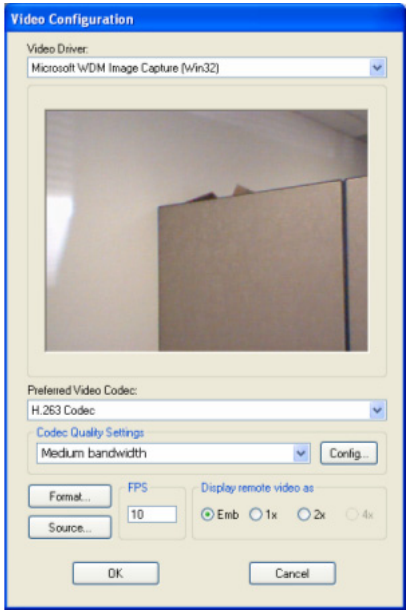
Setting	Very Low	Low	Med	High	Very High
Enable Deblocking Filter	Y	Y	Y	Y	Y
Improve Resistance to Packet Loss	N	N	N	N	N
Independent Segment Decoding Mode	Y	Y	Y	Y	Y

Selecting H.264 video CODEC

The different formats that you can use to send and receive video depend on the support you have for different CODECs. Contact your system administrator for this information or check your **Personal Agent, Preferences**, **Services**, **Service package**.

To choose H.264 as the preferred video CODEC,

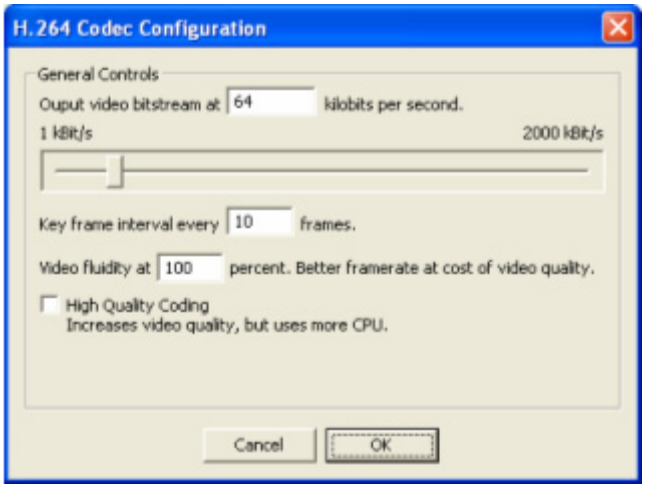
1 Click **Preferences**, **Video**, **Configure.** The Video Configuration window appears**.**



2 Select **H.264 Codec** from the **Preferred Video Codec** drop-down list.

If your video camera does not support a video capture format that is usable by the H.264 CODEC, then the H.264 CODEC does not appear as a choice.

3 Select one of the **Codec Quality Settings** or click **Config**.


H.264 Codec Configuration
General Controls
Ouput video bitstream at 64 kilobits per second.
1 kBit/s
2000 kBit/s
Key frame interval every 10 frames.
Video fluidity at 100 percent. Better framerate at cost of video quality.
High Quality Coding
Increases video quality, but uses more CPU.
Cancel
OK

Using a custom video configuration must be done with care. The combination of a large video image size, high quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. Nortel encourages you to use one of the pre-defined video configurations for everyday use.

4 Use the guidelines in the table to adjust the custom video configuration.

H.264 custom video configuration	Description
Output video bitstream (rate)	This specifies the maximum bitrate that the encoder transmits, not including header information. Drag the slider or enter a value in the text box above it.
Key frame interval	This value allows you to change the interval of sending keyframes, which could reduce the bandwidth requirement at the cost of quality. The default value is 8 (medium, high, and very high quality settings), and you can specify values between 1 and 300.

H.264 custom video configuration	Description
Video fluidity	This value allows you to improve the frame rate of the video at the cost of quality. A lower value for Video Fluidity will produce more choppy video motion, with a higher image quality for each frame of video. The default value is 100 (all quality settings).
High Quality Coding	This setting improves higher quality encoding of video, at the cost of more CPU. Almost twice the CPU usage is required when this setting is enabled, for a picture quality improvement of almost 1db in SNR at the same bitrate.

5 Click **OK**.

Both clients in a call must support H.264 video CODEC in order to send and receive. However, if either client does not have H.264 then Nortel proprietary video is sent.

The following table lists the H.264 Codec Quality Settings default values.

Setting	Very Low	Low	Med	High	Very High
Bitstream	8	64	192	512	768
Key Frame Interval	10	10	8	8	8
Video Fluidity	100	100	100	100	100
High Quality Coding	N	N	N	N	N

Selecting MPEG4 video CODEC

The different formats that you can use to send and receive video depend on the support you have for different CODECs. Contact your system administrator for this information or check your **Personal Agent, Preferences**, **Services**, **Service package**.

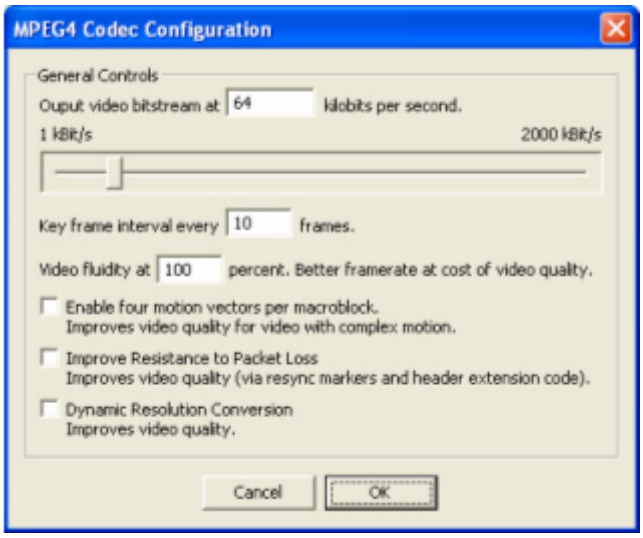
To choose MPEG4 as the preferred video CODEC,

1 Click **Preferences**, **Video**, **Configure.** The Video Configuration window appears**.**

2 Select **MPEG4 Codec** from the **Preferred Video Codec** drop-down list.

If your video camera does not support a video capture format that is usable by the MPEG4 CODEC, then the MPEG4 CODEC does not appear as a choice.

3 Select one of the **Codec Quality Settings** or click **Config**.


MPEG4 Codec Configuration
General Controls
Ouput video bitstream at 64 kilobits per second.
1 kBit/s
2000 kBit/s
Key frame interval every 10 frames.
Video fluidity at 100 percent. Better framerate at cost of video quality.
Enable four motion vectors per macroblock.
Improves video quality for video with complex motion.
Improve Resistance to Packet Loss
Improves video quality (via resync markers and header extension code).
Dynamic Resolution Conversion
Improves video quality.
Cancel
OK

Using a custom video configuration must be done with care. The combination of a large video image size, high-quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. Nortel encourages you to use one of the pre-defined video configurations for everyday use.

4 Use the guidelines in the table to adjust the custom video configuration.

MPEG4 custom video configuration	Description
Output video bitstream (rate)	This specifies the maximum bitrate that the encoder transmits, not including header information. Drag the slider or enter a value in the text box above it.
Key frame interval	This value allows you to change the interval of sending keyframes, which could reduce the bandwidth requirement at the cost of quality. The default value is 8 (medium, high, and very high quality settings), and you can specify values between 1 and 300.
Video fluidity	This value allows you to improve the frame rate of the video at the cost of quality. A lower value for Video Fluidity will produce more choppy video motion, with a higher image quality for each frame of video. The default value is 100 (all quality settings).

MPEG4 custom video configuration	Description
Enable four motion vectors per macroblock.	Instead of having one motion vector for each16x16 macroblock, four separate motion vectors can be specified (for four 8x8 blocks). This provides better motion quality in video that contains compound motion. This may require slightly more bitstream for the extra information.
Improve Resistance to Packet Loss	Packet loss resistance is improved by enabling resynchronization markers in the video, which accelerates recovery from transmission issues. Header Extension Code is also used in the video packet header to improve error resiliency. This setting can be used to improve video quality on connections with high packet loss.
Dynamic Resolution Conversion	This is a technique that adapts temporal resolution depending on video content and circumstances in real time. This also helps error conditions, since error-related artifacts become less noticeable because the errors are more spread over the bitstream. (This setting requires back-channel information sent to the encoder).

5 Click **OK**.

Both clients in a call must support MPEG4 video CODEC in order to send and receive. However, if either client does not have MPEG4, then the client sends Nortel proprietary video.

The following table lists the MPEG4 Codec Quality Settings default values.

Setting	Very Low	Low	Med	High	Very High
Bitstream	8	64	192	512	768
Key Frame Interval	10	10	8	8	8
Video Fluidity	100	100	100	100	100
Enable four motion vectors for each macroblock	N	N	Y	Y	Y
Improve Resistance to Packet Loss	Y	Y	Y	Y	Y
Dynamic Resolution Conversion	N	N	N	N	N

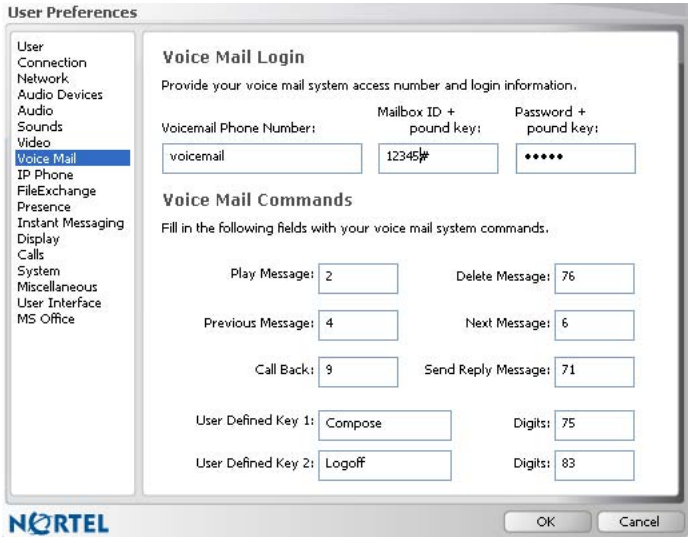
Setting up network-based voicemail access (optional)

Voicemail preferences allow you to customize how the Personal Communicator Client behaves when contacting your voicemail server.

Access to the voicemail settings depends on whether this service is assigned to you. If you do not have voicemail support, you cannot alter the voicemail settings.

To set up your network-based voicemail access,

1 Select **Tools, Preferences, Voice Mail**.



2 Enter the **Voicemail Phone Number** of your voicemail system, without punctuation. Remember to enter any extra digits required by your organization's phone network.

3 Enter the **Mailbox ID** and the pound (#) symbol, if required.

4 Enter your **Password** and the pound (#) symbol, if required.

Tip: After auto-dialing your voicemail system number, by default, the Personal Communicator Client waits three seconds before dialing your mailbox ID, then waits another two seconds before dialing your password. If you need to increase the delay to match the timing of your voicemail systems prompts, add one or more commas (,) before the mailbox ID and/or password value. Each comma represents an additional one-second delay.

5 Enter the **numeric function commands** your voicemail uses to perform standard functions, such as playing and deleting messages and sending replies.

The Personal Communicator Client uses this information to support at-a-select voicemail functions.

6 Optionally define up to two **custom voicemail functions** and the keystrokes that activate them.

7 Click **OK** to save your changes or **Cancel** to exit without saving.

Setting up Nortel IP Phones (optional)

Tip: These settings are not available to users who have access to the Multimedia Web Client only, Personal Communicator Client with Converged Desktop service, or Personal Communicator Client with no voice capability.

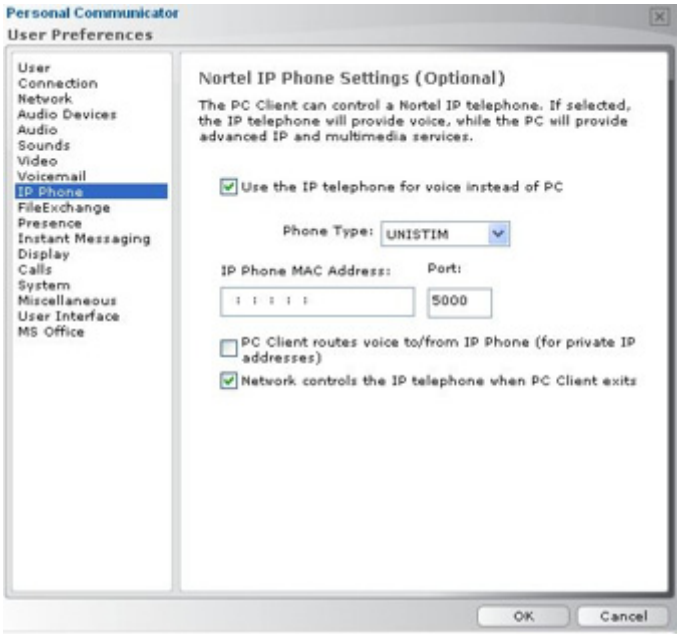
If you have a Nortel IP Phone or other SIP phones of which your Personal Communicator Client must take control, then you must configure the Nortel IP Phone settings.

Tip: The option of configuring your IP phone for UNISTIM or SIP is dependent on the services assigned to you by your service provider.

Setting your Nortel IP Phone for UNISTIM

To set up your Nortel IP Phone for UNISTIM,

1 Select **Tools, Preferences, IP Phone**.



2 Check **Use the IP telephone for voice instead of PC** to indicate that you want the Nortel IP Phone to provide voice while the PC provides advanced IP and multimedia services.

3 From the Phone Type drop-down list, select **UNISTIM**.

4 Enter the port number (and optionally the MAC address) for the Nortel IP Phone.

Tip: The Personal Communicator Client can automatically detect and fill in the MAC address field with information it obtains from the first Nortel IP Phone that attempts to contact it on the port specified in Step 4.

5 Check whether you wish the network to take over control of the Nortel IP Phone when the Personal Communicator Client exits.

The default is that this feature is activated. This step is optional.

6 Check whether the Personal Communicator Client routes voice to/from the Nortel IP Phone for private IP addresses.

This option may be required if you are using a private LAN in a home office. This is not usually required for work office use. The default for this feature is not active.

7 Click OK.

Setting your Nortel IP Phone for SIP

To set up your Nortel IP Phone for SIP,

1 Select **Tools, Preferences, IP Phone**.

2 Check **Use the IP telephone for voice instead of PC** to indicate that you want the Nortel IP Phone to provide voice while the PC provides advanced IP and multimedia services.

3 From the Phone Type drop-down list, select **SIP Phone**.

4 Select either **All my SIP Phones** or **A specific phone**.

5 In the Phone contact drop- down list, select the desired IP Phone contact. This option is enabled only when you are configuring a specific phone.

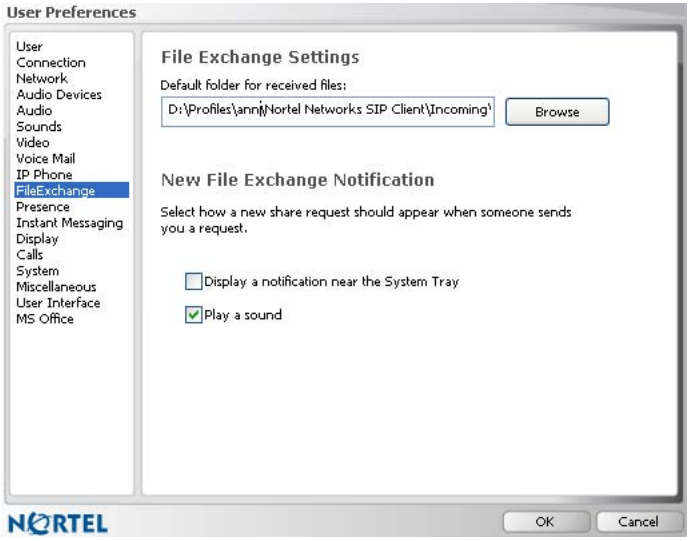
6 Select **Ring phone** to ring the selected IP phone**.**
This option is enabled only when you are configuring a specific phone.

7 Click **OK**.

Setting up file exchange settings (optional)

To set up file exchange settings,

1 Select **Tools, Preferences, FileExchange**.



2 Specify the default folder location for received files.

3 Select how you want to be notified when you receive a share request:

— Select the check box **Display a notification near the System Tray** to display a system tray popup window when you receive a share request.

— Select the **Play a sound** check box to have the Personal Communicator Client generate an audible alert when a share request is received.

4 Click **OK** to save your changes or **Cancel** to exit without saving.

Setting automatic presence preferences

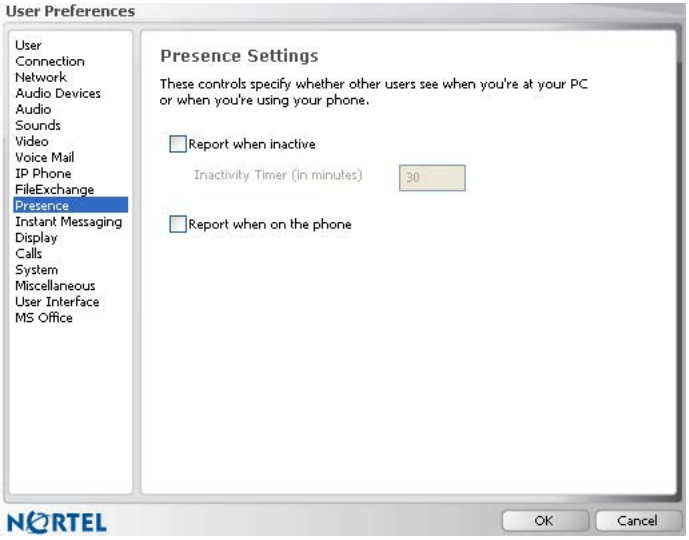
Presence preferences allow you to customize automatic presence indicator support. The Personal Communicator Client can update your presence status to show when your PC is idle or when your telephone is occupied.

Access to the automatic presence settings depends on whether this service is assigned to you. If you do not have automatic presence support, then you cannot alter these presence settings.

Specifying automatic presence idle detection

To set up your automatic presence idle detection,

1 Select **Tools, Preferences, Presence**.



2 Select the **Report when inactive** check box.

3 Enter the number of minutes that must elapse before your presence status is reported as idle.

Tip: The minimum value of the Inactivity Timer (in minutes) depends on your settings. Your system administrator sets the minimum value.

4 Click **OK** to save your changes or **Cancel** to exit without saving.

Your automatic presence settings are automatically uploaded to the network and the Personal Agent is updated to match your presence settings.

Specifying automatic presence phone usage detection

To set up your automatic presence phone usage detection,

1 Select **Tools, Preferences**, **Presence**.

2 Select the **Report when on the phone** check box.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

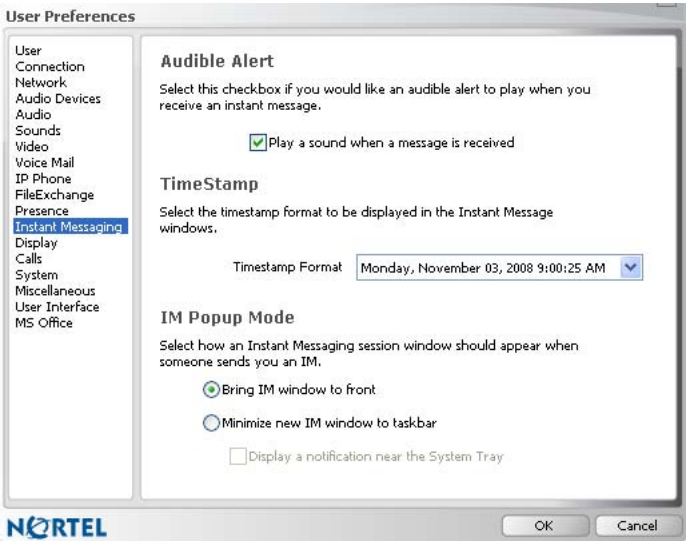
Setting instant messaging preferences

Instant messaging preferences allow you to customize how the Personal Communicator Client behaves during instant messaging.

Specifying an audible alert

To control whether the Personal Communicator Client generates an audible alert when an instant message is received,

1 Select **Tools, Preferences, Instant Messaging**.



2 Select the **Play a sound when a message is received** check box to have the Personal Communicator Client generate an audible alert when you receive an instant message. Clear the check box if you do not want the Personal Communicator Client to generate an audible alert when you receive an instant message.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Specifying instant message timestamps

By default, the Personal Communicator Client displays a time and date stamp for every instant message. To change the date display format or to remove the datestamp from being displayed,

1. Select **Tools, Preferences, Instant Messaging**.
2. Select the desired timestamp format from the **Timestamp format settings** drop-down list.
3. Click **OK** to save your changes or **Cancel** to exit without saving.

Specifying instant message pop-up behavior

By default, when the Personal Communicator Client receives an instant message, a **Conversation** window appears and assumes window focus. To configure how the Personal Communicator Client behaves when an instant message is received,

1. Select **Tools, Preferences, Instant Messaging**.
2. Select
   - **Minimize new IM window to taskbar** to have the Personal Communicator Client only flash the taskbar and not have the new instant message pop up on your desktop.

     When you select this option, you can also select the check box **Display a notification near the System Tray**. This displays a system tray pop-up window when you receive an instant message.
   - **Bring IM window to front** to have the Personal Communicator Client bring the **Conversation** window to the front of your desktop.
3. Click **OK** to save your changes or **Cancel** to exit without saving.

Setting display preferences

Display preferences allow you to customize how the Personal Communicator Client interface behaves.

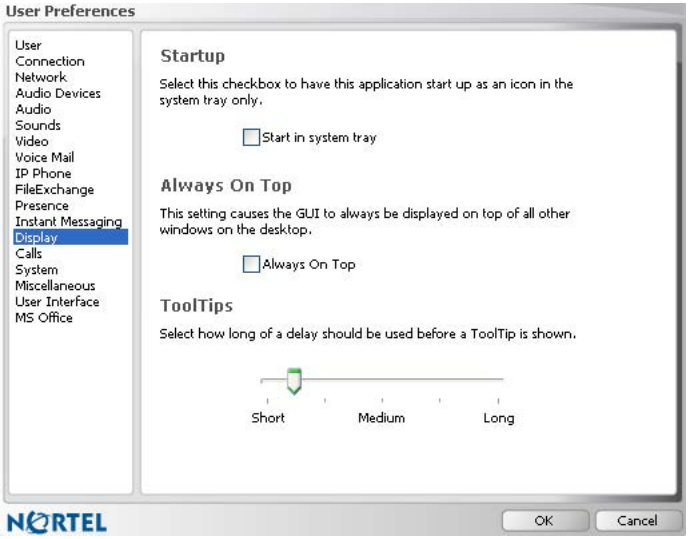
Setting the Personal Communicator Client to startup as an icon

This option allows you to set the Personal Communicator Client to start up without opening on your desktop (silent startup). You only see the Personal Communicator Client icon appear in the system tray.

Tip: This option is not selectable and is dimmed for users who have access to Multimedia Web Client only.

To set the Personal Communicator Client to start up automatically,

1 Select **Tools, Preferences, Display**.



2 In the **Startup** section, select the **Start in system tray** check box if you want the Personal Communicator Client to start up as an icon in the system tray.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Specifying how the main interface appears on the desktop

To specify whether the Personal Communicator Client main interface appears on top of other applications' windows,

1 Select **Tools, Preferences, Display**.

2 In the **Always On Top** section, select the **Always On Top** check box if you want the Personal Communicator Client main GUI to appear on top (in front) of other applications on your desktop.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Specifying a tool tips delay

To specify the delay before the tool tip shows up,

1 Select **Tools, Preferences, Display**.

2 In the **Tool Tips** section, select how long the Personal Communicator Client waits before displaying a Tool Tip.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Setting calls preferences

Calls preferences allow you to enable or disable dialing prefixes when making a call. Call preferences also enable you to specify call session window pop-up behavior.

Setting up a dialing prefix

To set up a dialing prefix,

1 Select **Tools, Preferences, Calls**.

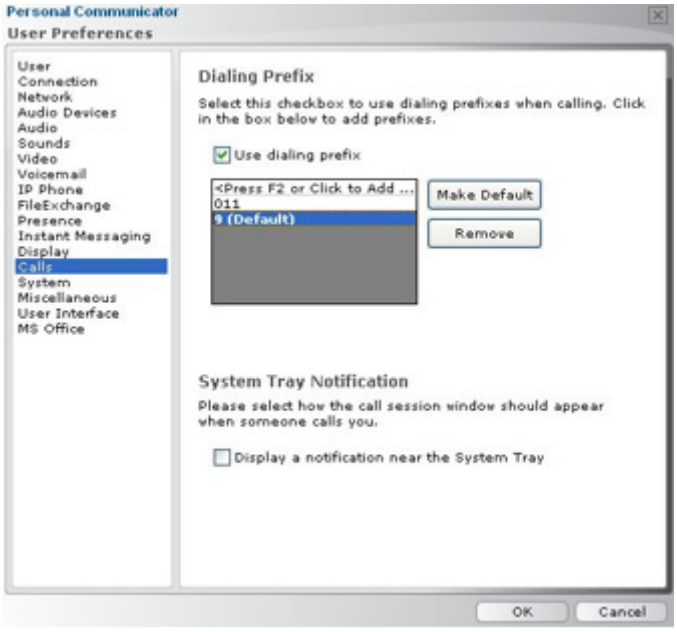
2 Select the **Use dialing prefix** check box.

3 Click the **<Click to Add New Prefix>** and enter the new prefix you wish to define.

4 Press **Enter**.

The prefix appears in bold, indicating it is your default dialing prefix. Continue to add more dialing prefixes as needed.

Note that the additional prefixes are not highlighted, indicating they are not your default dialing prefixes.



5 Select a prefix from the list you entered and click **Make Default** to change your default dialing prefix.

The dialing prefix you choose appears in bold.

6 Select a prefix from the list you entered and click **Remove** to remove a dialing prefix.

Specifying call pop-up behavior

By default, when the Personal Communicator Client receives a call, a system tray notification appears. From here, you can choose to answer or ignore the call. To turn the notification on or off,

1 Select **Tools, User Preferences, Calls**.

2 Under **System Tray Notification**, check or uncheck the box labeled **Display a notification near the System Tray**.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Setting system preferences

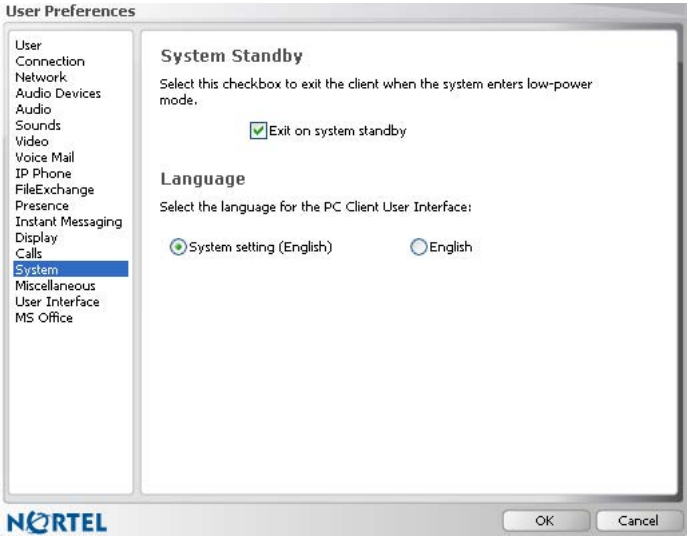
System preferences allow you to customize how the Personal Communicator Client behaves when the PC enters low power mode. It also allows you to select the language of the Personal Communicator Client interface.

Tip: If you are running your Personal Communicator Client on Windows Vista, you do not have the System Standby option available. If your system goes into standby or sleep mode, your Personal Communicator Client running on Windows Vista tries to log out within two seconds; however, it may not, in all instances, log out completely.

Setting the standby option

To set up the standby option,

1 Select **Tools, Preferences, System**.



2 Select the **Exit on system standby** check box if you want to exit the Personal Communicator Client when the system enters low power mode.

Low power mode is one of the following:

- **Standby** - Power to most PC components is off, but RAM remains powered in order to preserve system state.

- **Hibernate** - The system state is saved to the hard drive, and power to all PC components is turned off.
- **Eject** - Similar to Standby, but it causes a hardware re-configuration to occur in the PC.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Choosing the language of the Personal Communicator Client

System preferences let you select the language of the Personal Communicator Client. You can choose the same language as your Windows operating system or select English. System setting (English) is the default selection.

1 Select **Tools**, **Preferences**, **System**.

2 Select the language for the Personal Communicator Client interface.

3 Select **OK**. The system prompts you to restart your Personal Communicator Client.

The languages that the Personal Communicator Client supports are Latin American Spanish, Parisian French, Traditional Chinese, Simplified Chinese, Japanese, English, Korean, and German.

4 Select **Login, Exit**.

5 Start the Personal Communicator Client. The display appears in the language you chose.

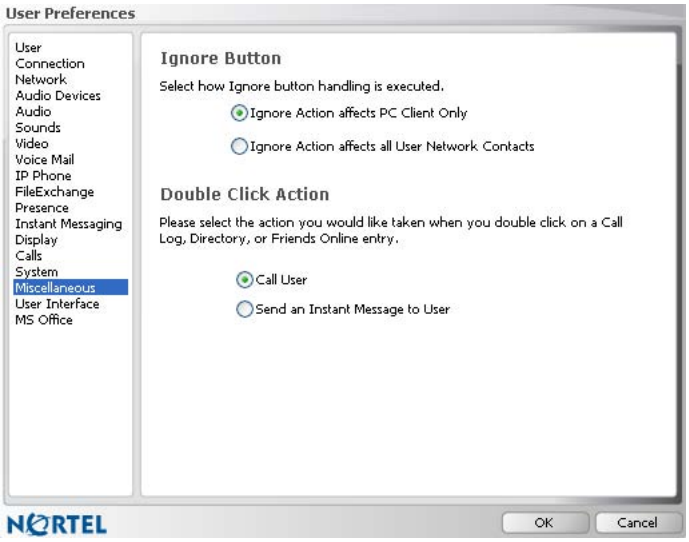
Specifying miscellaneous settings

Miscellaneous preferences allow you to customize how the Personal Communicator Client behaves when you click **Ignore** and when the mouse double-clicks an entry.

Specifying Ignore button action

To specify the action the Personal Communicator Client performs when you click **Ignore** for an incoming call,

1 Select **Tools, Preferences, Miscellaneous**.



2 Select how the Personal Communicator Client behaves when you click **Ignore** on a receiving call **Conversation** window:

— **Ignore Action affects Personal Communicator Client Only** silences ringing only on the Personal Communicator Client; your other network devices continue to ring.

— **Ignore Action affects all User Network Contacts** silences ringing on the Personal Communicator Client plus all your network devices; the incoming call route advances to your next route list.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Specifying double-click action

If you do not have the Instant messaging service assigned to you, the double-click action section of the miscellaneous option will not be included. The double-click action will always be to initiate a call.

To specify the action the Personal Communicator Client performs when double-clicking an entry,

1 Select **Tools, Preferences, Miscellaneous**.

2 Select what action the Personal Communicator Client performs when double-clicking an entry:

— **Call User** initiates a call to the selected entry.

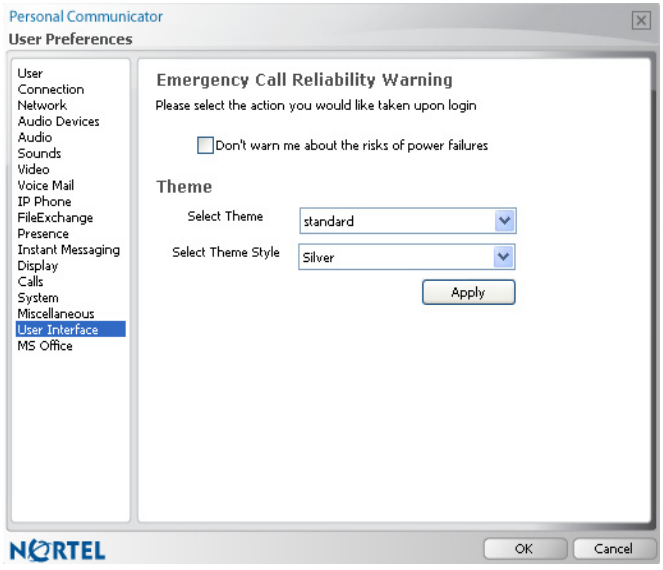
— **Send an Instant Message to User** sends an instant message to the selected entry.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

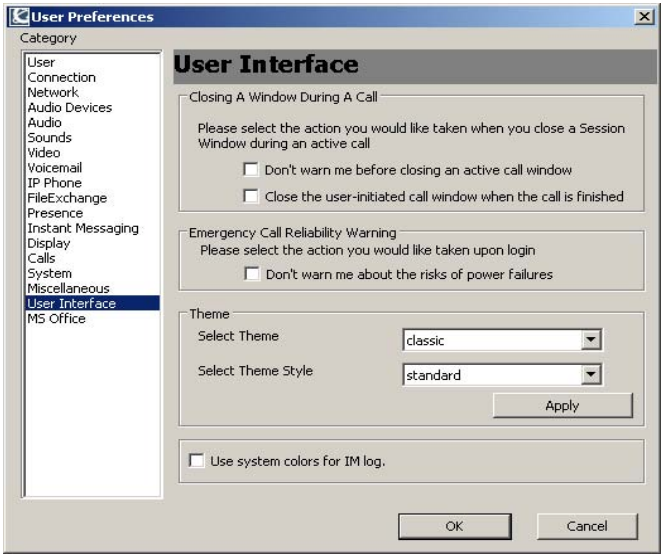
Specifying user interface settings

In both the Standard and Classic Personal Communicator Client interfaces, the User Interface settings enable you to specify settings related to power failure warnings and themes. In addition, the Classic Personal Communicator Client interface also allows you to specify settings related to closing conversation

windows and system colors for the IM log.



Standard Personal Communicator Client



Classic Personal Communicator Client

Tip: The risk of power failure warning is only available if your Personal Communicator Client has voice enabled.

Receiving a warning window in case of power failure

As there is a risk associated with power failures, your Personal Communicator Client warns you about it each time you login. You can turn this warning off from the user interface settings

To turn off warning of power failure,

1 Select **Tools, Preferences**, **User Interface**.

2 Select the **Don't warn me about the risks of power failures** check box if you do not wish your Personal Communicator Client to warn you each time you login that your service may cease to function if there is a power outage or failure.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

Selecting a new theme

To select a new theme,

1 Select **Tools, Preferences**, **User Interface**.

2 Select the theme from the drop-down list.

3 Select the theme style from the drop-down list.

4 Click **Apply**.

The Personal Communicator Client window updates and appears with the new theme. You may be prompted to confirm your IP address and telephone number.

5 Click **OK**.

Tip: Remember, if you have access to the Multimedia Web Client only, you cannot a select a new theme.

Closing a window

Ending a voice conversation does not necessarily close the Conversation window. If there are other active conversations with the user, the window stays open. For example, if the instant messaging control pane is open, the Conversation window remains open even after the voice conversation has ended.

You have two settings for closing a window. The first allows you to disable a warning that appears when you close an active call, and the second enables the window to close automatically when the call has ended.

Tip: This procedure applies to the Classic interface only.

To change the settings for closing a window,

1. Select **Tools, Preferences, User Interface**.
2. Check **Don't warn me before closing an active call window**, if you do not want to be warned when you try to close an active call window.
3. Check **Close the user-initiated call window when the call is finished** to automatically close the window when a call is finished.
4. Click **OK** to save your changes or **Cancel** to exit without saving.

Selecting system colors for IM log

Tip: This procedure applies to the Classic interface only.

To select system colors for the IM log,

1. Select **Tools, Preferences, User Interface**.
2. Select **Use system colors for IM log,** if you want the IM log in the instant message control pane of the IM Conversation window to use system colors.
3. Click **OK**.

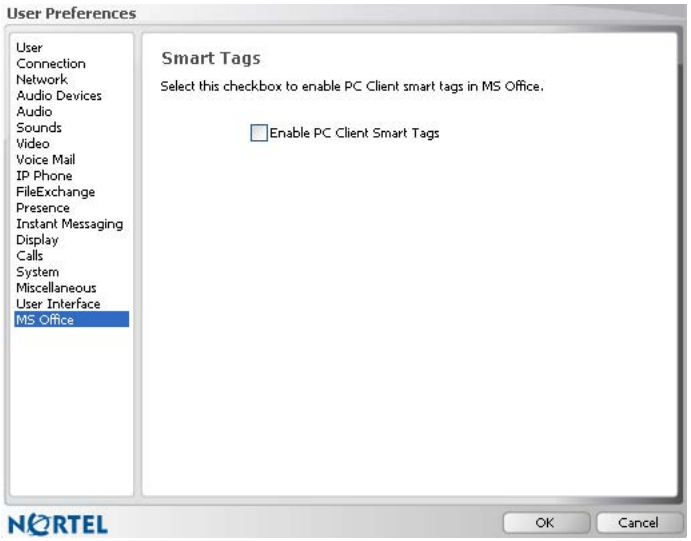
Specifying MS Office preference

The MS Office preference lets you enable Smart Tags. Smart Tags are a technology offered by Microsoft that allows you to use Personal Communicator Client functions such as making a call or sending an instant message from within a Microsoft Office Application such as Word, Excel, PowerPoint and Outlook.

Smart Tags work by recognizing and highlighting certain types of data, such as a person's name or telephone number, in a Microsoft application. When you select the Smart Tag-enabled data, a menu of Personal Communicator Client actions appears.

To enable the Smart Tag feature in the Personal Communicator Client,

1 Select **Tools, Preferences**, **MS Office**.

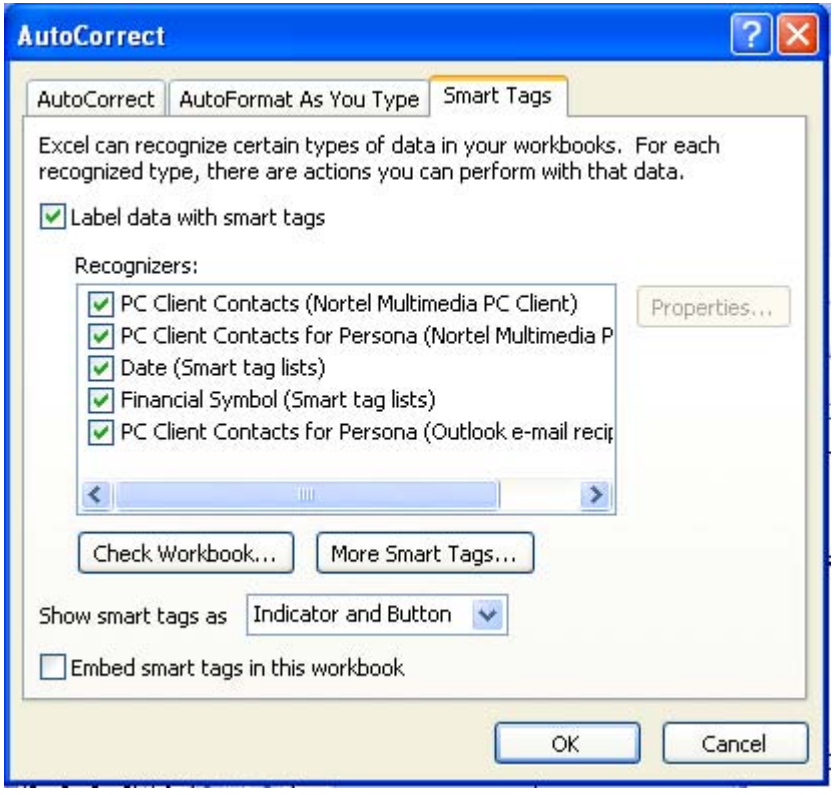


2 Select the **Enable Personal Communicator Client Smart Tags** if you want to use Smart Tags with the Personal Communicator Client.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

If the Personal Communicator Client Smart Tags option changes while an MS Office application is running, the change will not take effect in that application until the application restarts.

You can also enable or disable Personal Communicator Client Smart tags in most MS Office applications from the AutoCorrect options located on the standard Tools menu. To disable Personal Communicator Client smart tags, uncheck all Personal Communicator Client Contacts entries from the smart tags list.


AutoCorrect
AutoCorrect
AutoFormat As You Type
Smart Tags
Excel can recognize certain types of data in your workbooks. For each recognized type, there are actions you can perform with that data.
Label data with smart tags
Recognizers:
PC Client Contacts (Nortel Multimedia PC Client)
PC Client Contacts for Persona (Nortel Multimedia P
Date (Smart tag lists)
Financial Symbol (Smart tag lists)
PC Client Contacts for Persona (Outlook e-mail recip
Properties...
Check Workbook...
More Smart Tags...
Show smart tags as
Indicator and Button
Embed smart tags in this workbook
OK
Cancel

For more information about using smart tags, refer to the Microsoft Smart tags documentation.

Using the audio wizard to configure audio volume

Use the audio wizard tool to configure your microphone and speakers audio levels.

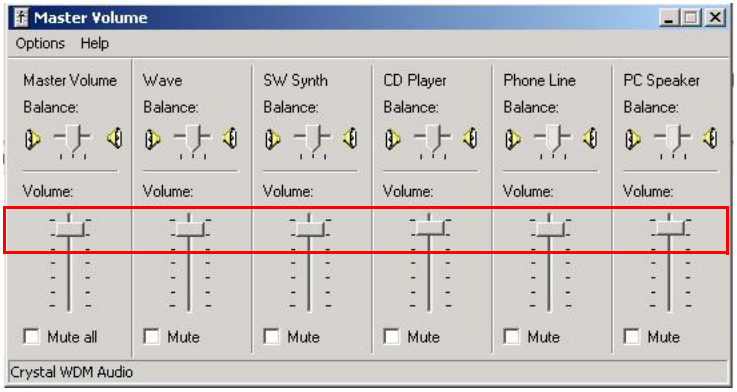
These settings are not available for the Converged Desktop users.

To test and adjust audio settings for optimal voice transmission and reception quality,

1. Select **Tools, Preferences, Audio**.
2. Click **Launch** to start the audio test wizard. The **Audio Wizard** window appears.
3. Shut down any other audio applications that are running and click **Next** to continue.
4. Click **Start** and begin talking into your microphone.

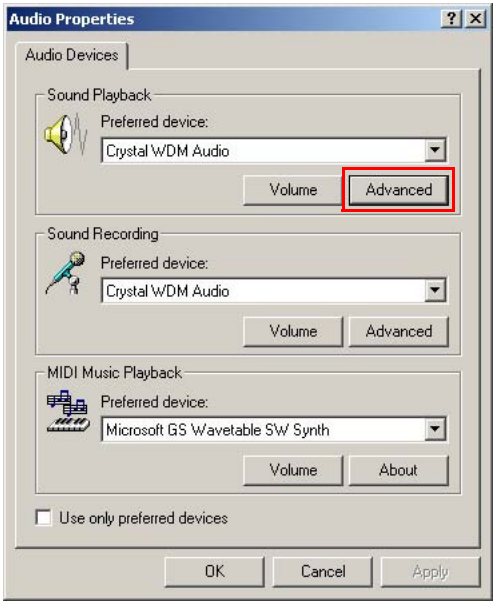
   You should hear your voice coming through the speakers or headset.
5. Click **Stop** to stop the audio recording and playback.
6. Click **Next** to end the audio test call.
7. If you did not hear yourself during the audio test call, click **Settings** to display your sound card **Audio Properties** window.

8 Click **Volume** from the Sound playback device to display your Volume Control window.



9 Adjust all volume settings to approximately 80% and close the window.

10 Click **Advanced** from the Sound playback device in the **Audio Properties** window.



The Advanced **Audio Properties** window appears, showing your speakers setting.

11 Select the appropriate option from the Speaker Setup drop-down list.

For example, if you use a laptop without a headset for applications other than the Personal Communicator Client, select the **Laptop Stereo Speakers** option.

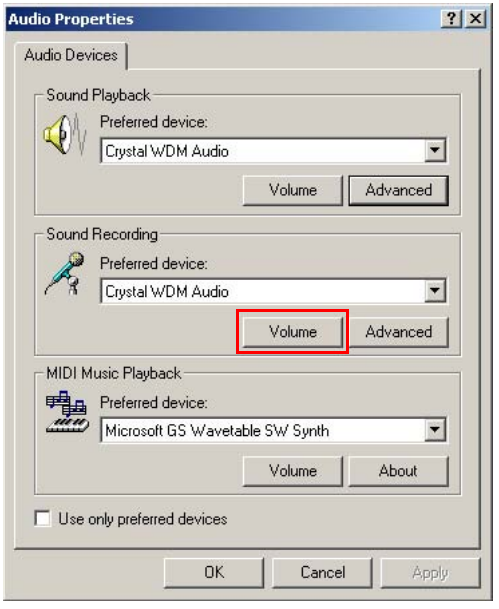
12 Click **OK** to save the setting.

13 Select the Performance tab from the **Advanced Audio Properties** window.

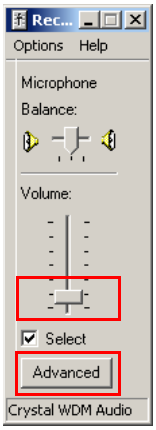
14 Set the Hardware acceleration to **Full** and Sample rate conversion quality to **Best**.

15 Click **OK** to save the settings.

16 Click **Volume** from the Sound recording device in the **Audio Properties** window.



The Recording Control window appears.



17 Adjust the microphone setting to approximately 15%.

18 Click **Advanced** to display your Advanced Controls for Microphone window.

Advanced Controls for Microphone
These settings can be used to make fine adjustments to your audio.
Tone Controls
These settings control how the tone of your audio sounds.
Bass: Low High
Treble: Low High
Other Controls
These settings make other changes to how your audio sounds. See your hardware documentation for details.
1 Microphone Boost
Close

19 Ensure that the **Microphone Boost** check box is unchecked.

20 Click **Close**.

21 Click **OK** to close the **Audio Properties** window.

22 Click **Finish** to close the **Audio Wizard** window.

Configuring multiple profiles

If you are a laptop user, you may have different configuration needs, depending on where you are located (for example, at work or at home). Often the configuration of the Personal Communicator Client in one location is not correct when you connect your laptop in a different location.

For example, as a laptop user you may have two Nortel IP Phones, one at the office and one at home. Depending on where the laptop is located, the Personal Communicator Client needs to establish communication with a specific Nortel IP Phone.

Tip: You cannot create multiple profiles if you have access to Multimedia Web Client only.

The Personal Communicator Client enables you to define multiple profiles. Each user profile you define has a completely separate set of preferences and configuration data. If you define multiple profiles, then the Personal Communicator Client prompts you to select the profile suitable for the current network environment at startup.

Adding a new profile

To add a new user profile,

1 Select the **Start, Programs, Nortel PC Client, Profile Manager** program icon in the Personal Communicator Client program group on your PC. The **Profile Manager** window appears.

Profile Manager
The Nortel PC Client stores information about your settings and preferences in your personal profile.
Click New to create a new profile, or select a profile and click the appropriate button to rename or delete that profile.
When you are finished, click Launch to start the client or click Exit to exit the profile manager without starting the client.
wceprofile
Ann
Laptop at work
Laptop at home
New...
Rename...
Delete...
Launch
Exit

2 Click **New**.

A window prompts you to enter a profile name.

3 Enter the name of the new profile.

4 Click **OK** to save your changes or **Cancel** to exit without saving.

Tip: Double-click on a profile to automatically launch the Personal Communicator Client using that profile.

Removing a profile

To remove a user profile,

1 Select the **Start, Programs, Nortel Personal Communicator Client, Profile Manager** program icon in the Personal Communicator Client program group on your PC.

   The **Profile Manager** window appears.

2 Select a profile and click **Delete**.

   A confirmation window appears to confirm your deletion.

3 Click **Yes** to delete the user profile or click **No** to exit without deleting the user profile.

Renaming a profile

To rename a user profile,

1 Select the **Start, Programs, Nortel Personal Communicator Client, Profile Manager** program icon in the Personal Communicator Client program group on your PC.

   The **Profile Manager** window appears.

2 Select a profile and click **Rename**. A window prompts you to enter the profile's new name.

3 Enter the new name for the user profile.

4 Click **OK** to save your changes or **Cancel** to exit without renaming the user profile.

Automatic software upgrades

For automatic software upgrades, you need to download the Automatic Software Upgrade (ASU) packages. The downloaded ASU packages is saved under the user profile directory:

\<user profile directory>\<install directory name>\

For example, the ASU packages get saved under

\users\winuser\Nortel Personal Communicator Client\

Tip: If you have access to Multimedia Web Client only, then this section **Tip:** does not apply to you.

When you launch your Personal Communicator Client, it automatically checks to see if there is a need to upgrade the software. This occurs five minutes after you log on and every hour thereafter.

The following icons explain the colors of the Automatic Software Upgrade ASU) status button you will see in the status bar.

Tip: Remember, you see these status buttons only in the Classic Personal Communicator Client interface. Also,

yellow = in progress

red = failed

green = upgrade available

gray = client is up to date

If you have a low-speed connection to the Internet, you will be prompted to confirm before the updated files are downloaded to a temporary folder on your PC. If you selected a medium- or high-speed connection on this window, the files are automatically downloaded.

When you are prompted to update the software, a window appears.

1 Click **Yes** to install the latest software updates on your Personal Communicator Client.

2 Click **No** to not install the latest software updates.

Removal procedures

The following sections cover how to remove the Personal Communicator Client from your PC.

Tip: If you have access to Multimedia Web Client only, then this section does not apply to you.

Warning: You must shut down the Personal Communicator Client before attempting to remove the program. Failure to do so may leave extraneous Personal Communicator Client files remaining on your PC, even after the uninstall program completes its execution.

Removing the Microsoft Outlook plugin

When you remove the Personal Communicator Client, no special steps are required to remove the Microsoft Outlook plugin other than that you must completely exit out of Microsoft Outlook 2000 and above before running the Personal Communicator Client uninstall program.

If Microsoft Outlook 2000 or above is running while the Personal Communicator Client uninstall program is running, the button that the Outlook plugin uses will remain on the toolbar in Outlook. Since the Outlook plugin is no longer present on your PC after removing the Personal Communicator Client, the **Call** button will no longer function.

Remove the stranded button by right-clicking on the toolbar and selecting customize. Right-click **Call** and then **Delete**.

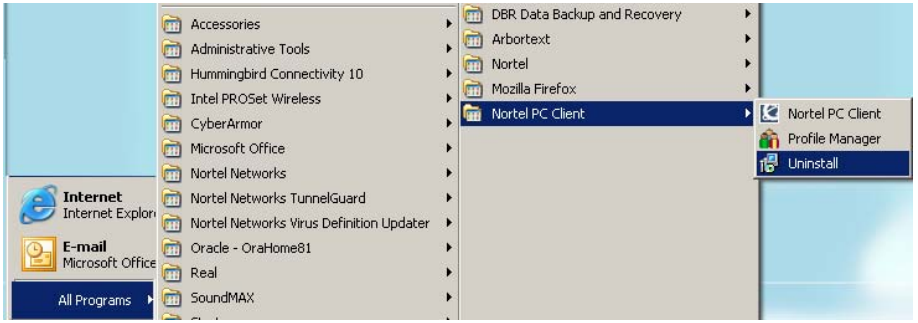
Removing the Personal Communicator Client

During installation of the Personal Communicator Client, the installer program creates both an uninstall icon for the Personal Communicator Client and an entry in the **Add/Remove Programs** control pane applet.

Tip: If you remove your Personal Communicator Client running on Windows Vista, you will receive a UAC prompt stating that the publisher is unidentified. This is currently a known InstallShield 2008 issue. Click **Allow** and continue the process of removing the Personal Communicator Client.

To remove the Personal Communicator Client using the uninstall program icon,

1 Select the **Start, Programs, Nortel Personal Communicator Client, Uninstall** program icon in the Personal Communicator Client program group on your PC.



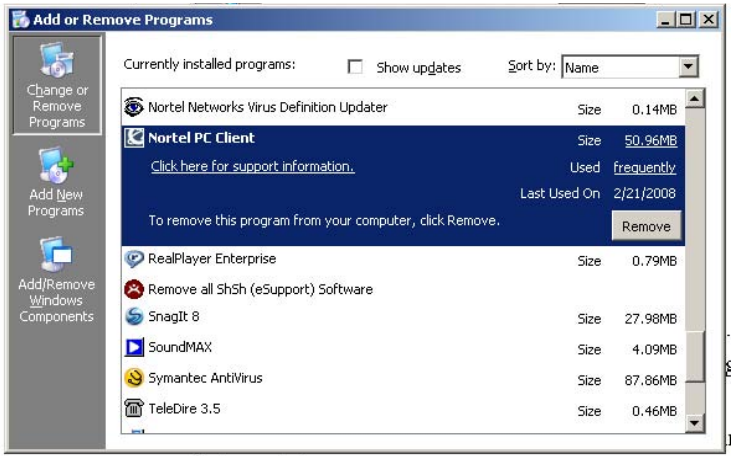
The Personal Communicator Client uninstall program launches and the uninstall confirmation dialog window appears.

2 Click **Yes** to remove the Personal Communicator Client from your computer; click **No** to cancel the uninstall procedure, leaving the Personal Communicator Client on your computer.

To remove the Personal Communicator Client using the Control Panel,

1 Select the **Start, Settings, Control Panel** to display the system **Control Panel** window.

2 Click the **Add/Remove Programs** icon to launch the **Add/Remove Programs** window.



3 Select Nortel Personal Communicator Client from the list of programs and click **Change/Remove**.

The Personal Communicator Client uninstall program launches and the uninstall confirmation dialog window appears.

4 Click **Yes** to remove the Personal Communicator Client from your computer; click **No** to cancel the uninstall procedure, leaving the Personal Communicator Client on your computer.

Tip: If you uninstall your Personal Communicator Client, the profiles do not get deleted. You will have access to your profiles once you reinstall the Personal Communicator Client.

You can remove personal profiles by deleting the Personal Communicator Client profiles directory. By default, this is located in the "Nortel Networks PC Client" directory on your PC, although you or your administrator can specify the location at the time of installation.

Chapter 8
Troubleshooting

Personal Communicator Client activities are automatically captured in a log file. If you experience any of the problems in this section, make sure to send these logs to your next level of support.

Topics in this chapter can help you troubleshoot if you have problems with the PC Client, such as starting up the Personal Communicator Client, setting up your audio, enabling your video, or using the sharing features.

Topics for Personal Communicator Client users:

- "For Personal Communicator Client users" on page 243
- "Calling and messaging problems" on page 248
- "Sharing problems" on page 249
- "Video problems" on page 250
- "Nortel IP Phone configuration problems" on page 252

Topics for Multimedia Web Client users:

- "For Multimedia Web Client users" on page 258

For Personal Communicator Client users

The following sections help you find solutions to some problems that you may come across with the Personal Communicator Client.

Personal Communicator Client will not connect

If your Personal Communicator Client will not connect, try the following general troubleshooting steps:

- If you are using a VPN client, make sure that it is up and running.
- Make sure that you have the right IP address.
- Make sure that your network connection is up and running.
- Verify that you have entered the correct username, domain name, and password.
- If you have changed your Internet security or advanced settings in Windows, reset to your default values. To restore default values, see "Resetting Internet Options" on page 255 and "Checking Security settings" on page 255.

If you continue to experience problems, contact your system administrator.

Reinstallation

For a number of reasons, the Personal Communicator Client may occasionally get corrupted. If this occurs, you will need to uninstall and reinstall the Personal Communicator Client. See "Removal procedures" on page 238.

Your preferences, call log entries, profiles, and IM history logs will survive the reinstallation.

Abnormal exit

There may be times when you have an abnormal exit from the Personal Communicator Client. Upon your next logon, a dialog window will appear with the message "The Personal Communicator Client did not exit properly from a previous run, and exiting properly is important to your network services."

When you see this message, you will need to continue to log on, then log off, and log on again.

Audio problems

Audio settings may need to be fine-tuned depending on the type of equipment you have.

Echo

If you use a desktop microphone and speakers as your sound input/output devices, your microphone often hears the sound from the speaker and the person on the far end will hear an echo. This is why Nortel recommends that you use a headset or handset with your PC. The use of headphones (without a microphone) along with your desktop microphone will also work.

Sometimes echo occurs even when using a headset. Usually, a quick adjustment of the volume can fix this. Try lowering the speaker volume and microphone gain.

If you are using a sound card with a headset connected (not the USB headset) and the sound quality is not good, ensure that you have the latest sound card driver version. If the latest version does not improve the sound quality, then contact the PC vendor and/or sound card manufacturer for support.

Some sound cards have input mixing capabilities. To see if your card supports this,

1. Launch the Windows volume control application through **Start, Programs, Accessories, Entertainment, Volume Control.**

   Your version of Windows may have a different path to the volume control. Check the **Start, Help** menu to find it.

2. Select **Options, Properties**.

3. Select **Adjust Volume for Recording** and click **OK**.

   If you have checked **Mixed Input**, you can experience echo even when using a headset.

4. Uncheck the **Mixed Input** check box and see if the echo has disappeared.

(Note that not all sound cards have this feature.) Muting **Wave** on the recording settings may also help with this problem.

Tip: To reduce echo of your headset (USB or analog), use the audio wizard to configure your audio volume. For more information, see "Using the audio wizard to configure audio volume" on page 228.

Disabling the Microphone Boost check box

If you are using an analog or a USB headset and echo occurs despite lowering your volume setting, use the audio wizard from **Tools, Preferences, Audio** window and ensure that the Microphone Boost check box is unchecked to eliminate echo. For information on how to uncheck the Microphone Boost check box, see "Using the audio wizard to configure audio volume" on page 228.

PC requirements for sound quality

The minimum requirement for good sound quality is to have a microphone and full-duplex sound card on your PC. If you use separate speakers on your PC, you must use the echo reducer option, which you can access from **Tools, Preferences, Audio, Echo Reducer**.

Enabling the Echo Reducer option will use more of your PC's system resources (CPU and Memory) and could cause performance issues if insufficient available Memory and/or slow CPUs are used. Only enable the Echo Reducer when necessary. If you are on a call and are generating the echo heard by others, and the Echo Reducer is not already selected, place the call on Hold, then select the Echo Reducer, and then take the call off hold. You can select the Enable Echo Reducer check box any time while you are not in a call for all subsequent calls to receive this treatment.

The recommended requirement for good sound quality is to have a full-duplex sound card with a headset with a microphone and headphone combination. With this type of headset, you will have better sound quality, and you may rarely have to use the echo reducer.

No voice during calls

Make sure no other audio applications are running. If another application is using your sound card, the Personal Communicator Client might not be able to access it.

Check to make sure your volume settings are correct.

Due to sound card conflicts, you cannot run the Personal Communicator Client and the Multimedia Web Client at the same time.

Distorted voice

Your sound card drivers may not be completely compatible with the Personal Communicator Client. This can be typical of older laptop computers and can usually be fixed by installing a different version of the sound card drivers. Check your computer manufacturer's website for details on obtaining sound card drivers for your computer.

The following table lists the recommended driver versions for the NeoMagic card for the various Microsoft operating systems.

Operating System	Recommended driver versions
Windows 2000	NM5A2WDM.SYS - 5.00.2144.1 WDMAUD.DRV - 5.00.2184.1
Windows XP	NM6WDM.SYS - 5.1.2461.0 WDMAUD.DRV - 5.1.2481.0
Windows Vista	

For laptops, Nortel recommends that you perform the driver upgrade while the computer is undocked, as it is usually the laptop's internal sound card that encounters problems and not the docking station's sound card (if the docking station has one).

Cannot speak when the other party is speaking

You may not have a full-duplex sound card (some laptops default to half-duplex mode). A full-duplex sound card is a minimum system requirement for the Adaptive Application Engine product. You can try a USB headset instead of replacing the sound card.

Cannot hear with headphones

Try plugging your headphones directly into your laptop instead of into the docking station.

Choppy audio when using USB headset

Choppy USB audio can occur when multiple USB devices are sharing the serial bus. Disconnect all other USB devices from your computer and see if the problem goes away. If you cannot disconnect the other devices, for example, if you are using a USB camera, disconnect the USB headset and switch to an internal sound card, using an analog headset for audio, or if you are a Standalone user, use a Nortel IP Phone for voice instead of PC.

Calling and messaging problems

Some of the enhanced features of the Personal Communicator Client may not be supported on your network.

Cannot complete call

When dialing a public telephone number, do not add any punctuation to the number. For example, 5556245 is a valid public telephone number while 972-555-6245 is not. Dial the number without the hyphens to make a call successfully. However, if your call does not complete without the hyphens, verify that you have dialed the correct number. If the number is correct, connection to this number may not be supported by your network. Contact your next level of support for more information.

Tip: Your company may decide to use your exact employee number as your user ID for making and receiving calls. If your employee number contains a hyphen or other punctuation, then use the employee number with the punctuation to make a call successfully.

Voicemail button is disabled

You must set up your voicemail access before the Personal Communicator Client can access your voicemail system. Access to voicemail preferences depends whether you have voicemail service support.

Sharing problems

The sharing tools are designed for specific tasks and may not provide all native windowing functionalities.

Cannot send a copied file using Send Clipboard

Use the File Transfer function to send files.

Cannot paste from my clipboard into my whiteboard

The Personal Communicator Client does not support copying from or pasting to the whiteboard.

Web Co-browsing does not work

Nortel recommends Internet Explorer version 6.0 and above or Firefox version 2.0 and above.

Video problems

Video cameras and video settings may require fine tuning to optimize the quality of the transmission.

Blurry video

Most video cameras have a focus ring to adjust the image. In a call where you are transmitting video, click the video preview check box (or select the 1x button) to see your transmitted image. Turn the focus ring (it usually encircles the lens) until the image is sharper.

Poor color/contrast/brightness

Most video cameras allow the user to tune these settings. Terminate any active video call, then do the following:

1. Go to **Tools, Preferences, Video** and click **Configure**.
2. If video does not appear in the **Video Configuration** window, select your video camera from the **Video Driver** drop-down list. (It is probably "Microsoft WDM.")
3. Click **Source** after video appears. This usually produces a multi-tab window that has controls to tune video color and brightness. Operate the controls until you are satisfied with the image.
4. Click **OK** to close the camera controls.
5. Click **OK** to close the **Video Configuration** window.
6. Click **OK** to close **Preferences**.

Adding a new video camera

First, make sure that the Personal Communicator Client has permission to perform video telephony. Go to **Tools, Preferences, Video**. If all of the controls are dimmed and non-operational, you may not have logged into the network (use the Login menu). If you have logged on to the network (that is, if there is a green light on your Login menu), your service profile does not include video. Contact your service provider or administrator.

If the video controls are enabled, make sure that the Client has been configured to send/receive video by verifying that the **Video Disabled** selection is NOT selected. Just click on another setting to set up video if video was disabled.

No CODECs video message

The camera may need to be manually configured, as follows:

1. Go to **Tools, Preferences, Video**, and click **Configure**.
2. If video does not appear in the **Video Configuration** window, select your video camera from the **Video Driver** drop-down list. (It is probably "Microsoft WDM.")
3. Click **Format** after video appears. The window that comes up varies from camera to camera but look for a control for "Pixel Depth / Compression" or "Format". Choose either RGB 24 or I420 in this control and click **OK**.
4. If "RGB 24" or "I420" is not listed as a selection, the camera may not be usable by the Personal Communicator Client. However, try examining other programs that came with the camera in order to enable **Video For Windows** with this camera. Also, check with the camera vendor's web site to obtain the most recent drivers.
5. Press **OK** to close the **Video Configuration** window
6. Press **OK** again to close **Preferences**.

Camera switches to receive-only

The Personal Communicator Client switches to receive-only video if it starts up and cannot locate a previously found camera. To transmit video again, go to **Tools, Preferences, Video**, disable video, then select your video configuration again.

Blue screen error

This is caused either by multiple cameras/video capture devices corrupting each other's installations or by buggy device drivers. Try to uninstall unneeded video devices, go to the vendor's web site, and ensure that you are running the latest drivers for the video device. If you are unsure of how to troubleshoot device installation conflicts, seek knowledgeable assistance.

Nortel IP Phone configuration problems

Tip: The section applies to Standalone users only.

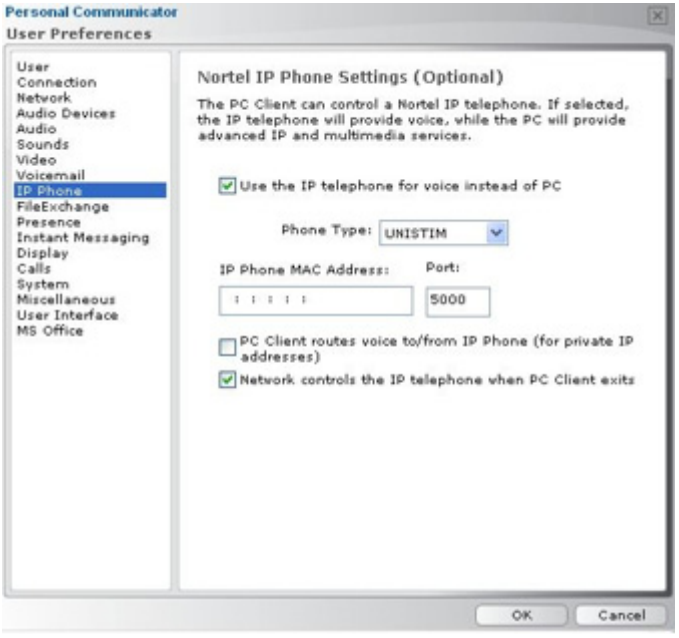
If you have access to Multimedia Web Client only, then this section does not apply to you.

When using a Nortel IP Phone, the configuration may require an extra step.

Personal Communicator Client Set controlling a Nortel IP Phone with voice path problems

When the Personal Communicator Client controls a Nortel IP Phone, the configuration is called a Personal Communicator Client Set. If you are a home-based user with the Personal Communicator Client Set settings or a user connected to your company's network, if no IPCM server is available and you experience problems with voice path in only one or both directions, then set up your Nortel IP Phone settings as follows:

1 Select **Tools, Preferences** and the **IP Phone** list item.



2 Check the **Use the IP telephone for voice instead of PC** to indicate that you want the Nortel IP Phone to provide voice while the PC provides advanced IP and multimedia services.

3 Enter the port number for the Nortel IP Phone.

Tip: The Personal Communicator Client automatically detects and fills in the MAC address field with information it obtains from the first Nortel IP Phone that attempts to contact it on the port specified in Step 3. The MAC address has 12 digits and is on the sticker on the back of the set.

4 Check the **Personal Communicator Client routes voice to/from IP Phone (for private IP addresses)** box.

If you can set S1 and/or S2 of the Nortel IP Phone to the IP Address of an IPCM server, and it can operate in a standalone mode, then do not check this box. Although this will work, it is not desirable since you create an additional network hop for the voice to go through your PC and not directly from the Nortel IP Phone. This is also not desirable since the voice from the set would also have to unnecessarily contend with data and application processes and system resources (CPU and Memory) being used on the PC.

5 Click **OK**.

Tip: For more information about your Nortel IP Phone, see *Nortel Adaptive Application Engine - Standalone Overview - Services and Features Feature Overview* (NN48111-112).

Personal Communicator Client services retrieval or download problems

When you log on to your Personal Communicator Client, you may sometimes fail to retrieve the services. Follow the procedures in this section for services retrieval or download problems. For more information, go to Microsoft Help and Support web site, http://support.microsoft.com/kb/887678.

Unable to retrieve services

If you are unable to retrieve your services, you may get the following error:

“Unable to retrieve services”

To resolve this problem, do the following:

1 Log out of your Personal Communicator Client.

2 Login to your Personal Communicator Client. The Personal Communicator Client should automatically retrieve your services.

When you log back into your Personal Communicator Client, ensure that your Presence status is “Connected.” If your login button is green, but your Presence status is “Unknown,” it means you need to reset your Internet Options to their default settings.

Resetting Internet Options

If you modified your Internet Options, reset the values and verify that it is configured to use SSL2.0 and SSL 3.0:

From your PC,

1. Go to **Start, Control Panel** and click **Internet Options.**
2. Click the **Advanced** tab from the Internet Properties window.
3. Scroll down to Security and check **Use SSL 2.0** and **Use SSL 3.0** check boxes.
4. Click **Apply**.
5. Click **Restore Defaults**.
6. Log out of your Personal Communicator Client. The services should download successfully.

Checking Security settings

If you are unable to retrieve or download services even after resetting the Restore Defaults option, check your Security settings by performing the following procedures:

- "Configuring the security settings for the Trusted sites zone" on page 256
- "Setting the Security Zones to default settings" on page 256
- "Clearing the Secure Sockets Layer (SSL) state and the AutoComplete history" on page 257
- "Turning off the pop-up blocker" on page 257
- "Looking for third-party firewall or antivirus programs" on page 257

Configuring the security settings for the Trusted sites zone

Tip: Only add those sites that you trust as a trusted site. If you are not sure about a Web site, do not add the Web site to the Trusted sites list.

To configure the security settings for the Trusted sites zone

1. Go to **Start, Control Panel** and click **Internet Options**.
2. Click the **Security** tab.
3. Click **Trusted sites**.
4. Click **Default Level**.
5. Click **Sites**. The **Trusted sites** window opens.
6. Type the URL of the any SSL-secured (128-Bit) Web site in the **Add this web site to the zone** field.
7. Click **OK**.
8. Click **Apply**.

Setting the Security Zones to default settings

1. From the **Security** tab on the Internet Properties window, Click **Internet**.
2. Click **Default Level**.
3. Click **Local Intranet**.
4. Click **Default Level**.
5. Click **Trusted sites**.
6. Click **Default Level**.
7. Click **Restricted sites**.
8. Click **Default Level**.
9. Click **Apply**.
10. From the **Privacy** tab, ensure that the Settings for the Internet zone are set to **Medium**. If it is not set to Medium, move the slider up or down and click **Default**.

11 Click **Apply**.

Clearing the Secure Sockets Layer (SSL) state and the AutoComplete history

1 Click the **Content** tab on the Internet Properties window.

2 In the **Certificates** section, click **Clear SSL State**.

3 Click **OK**.

4 In the Personal information area, click **AutoComplete**. The **AutoComplete Settings** window appears.

5 In the Clear AutoComplete history area, click **Clear Forms** and click **OK**.

6 Click **Clear Passwords** and click **OK**.

7 Click **OK** on the Content tab on the Internet Properties window.

Turning off the pop-up blocker

1 Click the **Privacy** tab on the Internet Properties window.

2 In the Pop-Up Blocker area, uncheck the **Block pop-ups** check box.

3 Click **Apply**.

4 Click **OK**.

Looking for third-party firewall or antivirus programs

Make sure that any third-party firewall or antivirus programs that are installed on your computer are configured correctly and are not preventing you from connecting to Web sites. For more information, see the product documentation or contact the program vendor.

If you are unable to retrieve or download services after performing the procedures listed in this section, please contact your next level of support.

For Multimedia Web Client users

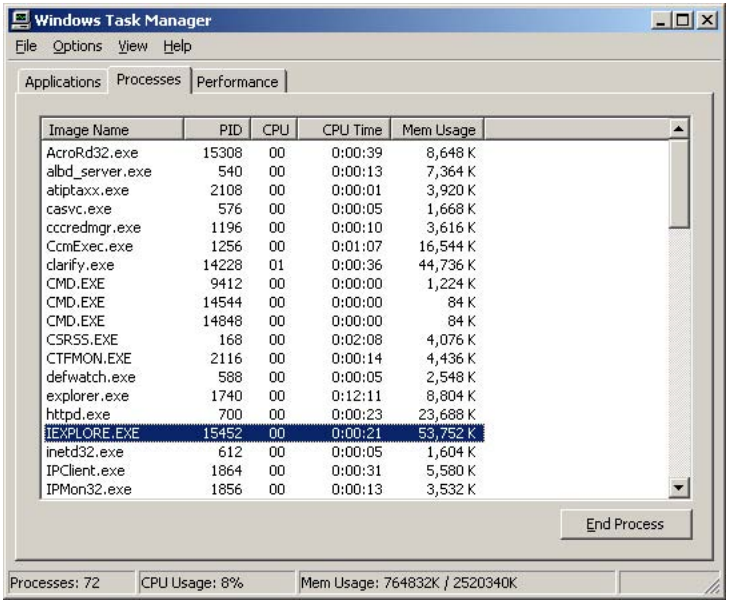
The Multimedia Web Client should automatically start and run from the Personal Agent Quick Start page if you have the correct system requirements. See the following sections for some troubleshooting tips.

Start-up or configuration problems

If you have start-up or configuration problems, you can do the following:

- Exit your browser (**File, Exit**) and restart.
- If you are using Internet Explorer (IE), verify it is correctly configured. For more information, see "Optional hardware and software requirements" on page 29.
- Check that you have the minimum hardware and operating system requirements. For more information, see "Minimum hardware and operating system requirements" on page 27.
- Verify there is no other Multimedia Web Client running in your browser. If you have previously used the Multimedia Web Client, Nortel recommends that you close all the web browser windows and ensure that you exit properly. This removes the Java Plug-in console icon from the system tray. However, if Java Plug-in console icon still exists, do the following:
  - Open the **Task Manager** window.
  - Click the **Processes** tab.

— Find the process named IEXPLORE.EXE for Internet Explorer and click **End Process**.


Windows Task Manager
File Options View Help
Applications Processes Performance
Image Name PID CPU CPU Time Mem Usage
AcroRd32.exe 15308 00 0:00:39 8,648 K
albd_server.exe 540 00 0:00:13 7,364 K
atiptaxx.exe 2108 00 0:00:01 3,920 K
casvc.exe 576 00 0:00:05 1,668 K
cccredmgr.exe 1196 00 0:00:10 3,616 K
CcmExec.exe 1256 00 0:01:07 16,544 K
clarify.exe 14228 01 0:00:36 44,736 K
CMD.EXE 9412 00 0:00:00 1,224 K
CMD.EXE 14544 00 0:00:00 84 K
CMD.EXE 14848 00 0:00:00 84 K
CSRSS.EXE 168 00 0:02:08 4,076 K
CTFMON.EXE 2116 00 0:00:14 4,436 K
defwatch.exe 588 00 0:00:05 2,548 K
explorer.exe 1740 00 0:12:11 8,804 K
httpd.exe 700 00 0:00:23 23,688 K
IEXPLORE.EXE 15452 00 0:00:21 53,752 K
inetd32.exe 612 00 0:00:05 1,604 K
IPClient.exe 1864 00 0:00:31 5,580 K
IPMon32.exe 1856 00 0:00:13 3,532 K
End Process
Processes: 72
CPU Usage: 8%
Mem Usage: 764832K / 2520340K

- If you see a **(No Connection)** message where you normally view your presence state, it means that, when your Multimedia Web Client launched, it failed to register with a server. This happened because there was a network connection issue between your PC and the server. You must contact your system administrator or service provider.

If you continue to have any start-up or configuration problems, contact your system administrator or service provider.

Appendix A
Terms you should know

This section defines the terms and acronyms used in this guide.

Terms

The Personal Communicator Client uses some terms that may be new to you. Take a moment to read through the explanations to familiarize yourself with the following terms:

- "Address" on page 261
- "Conference" on page 262
- "Conversation" on page 263
- "Services" on page 263
- "Friends" on page 263
- "Personal address book" on page 264
- "Global address book" on page 264
- "Presence" on page 265
- "Proxy server" on page 265
- "Call logs" on page 265

Address

When a procedure instructs you to enter an address, it means entering either a telephone number or a SIP address. A SIP address is a unique identifier of users on the IP network. It can either be a username or a phone number in a domain. It has the same format as an email address, for example, jdoe@lab1.org, but it is not an email address. The network can identify where you are and route your calls by

tracking your SIP address when you sign in to any Personal Communicator Client, Multimedia Web Client, or Nortel IP Phone. In order to make it easier to place calls, you can store addresses (SIP addresses or telephone numbers) in a personal address book.

Using SIP addresses allows you to take advantage of the more powerful features of the Personal Communicator Client, such as presence.

Conference

Conferences are calls that may involve more than two callers. The Personal Communicator Client can be used to create a conference or to dial into a conference.

The ability to create conferences depends on whether the conferencing service is assigned to you. If you do not have conferencing support, then you cannot have a conference on the Personal Communicator Client.

There are two types of conferences:

- Ad Hoc conferences are conferences that are created on the fly by joining multiple calls together into one conference call.
- Meet Me conferences are conferences that use a pre-defined conference number where users provide an access number (and optionally a passcode) to be placed into the appropriate conference bridge for audio and web collaboration (point-to-multi-point application sharing) conferences.

The network conference server is responsible for hosting both types of conferences. The Personal Communicator Client can be used to create Ad Hoc audio conferences, or to dial into Meet me audio or web-enabled conferences.

The conferencing procedures in this guide refer only to Ad Hoc audio conferences. For more information about Meet Me audio and web collaboration conferences, see *Nortel Adaptive Application Engine – Standalone Overview – Services and Features* (NN48111-112) and to the online help available in the Meet Me Web Collaboration service.

Conversation

The Personal Communicator Client allows you to converse with another user in a multitude of ways. Conversations can involve one or more multimedia functionalities. For example, a conversation may involve just voice, instant messaging, or both. The concept of conversations is key to understanding and using the multimedia capabilities of the Personal Communicator Client.

Services

Your service provider or system administrator assigns you a collection of services and the service profile for each of these services wherever applicable. Some services are only available to you if the service profile is assigned to you. If your administrator assigned a service, not the profile for the service, then you will have only the default or minimal functionality for this service.

Tip: The concept of service profiles is similar to the service package concept, where the service package is a collection of services and the service data for each of these services.

The GUI as documented in this guide may or may not be fully present, based upon the services and service profiles assigned for you. For example, your company may not support PC video cameras and therefore these settings would not be available for you to change. In addition to video, the service and service profile defines how many Friends you can have, how many callers you can join in an audio conference, and whether you have voice mail enabled.

If you have access to the Personal Agent, you can view the features and options available to you through **Preferences, Services, Service package**.

Friends

Within your personal address book, you can designate entries as Friends. People that you contact frequently are good candidates as Friends. If you have marked an address book entry as a Friend, then you can see the online presence status for that entry. Just click the **Friends Online** button to see your Friends and their online presence status.

The ability to see another user's presence information depends on whether this service is assigned to you. If you do not have presence support, then you cannot mark any address book entries as Friends. Consequently, you will not see any presence information available on your Personal Communicator Client.

In this interface	Presence is available from
Standard Personal Communicator Client	**Personal Contacts** tab
Classic Personal Communicator Client	**Friends Online** button

Personal address book

Your personal address book is a list of personally selected user contacts with a finite length. Opening the address book will show all your contacts that you can search or filter by entering search parameters. You can save your addresses for quick call access as well as organize address book entries into groups.

Your personal address book is synchronized across all your network access devices. If you make a change in your personal address book on the Personal Communicator Client, the change automatically appears on your other network access devices (for example, your Multimedia Web Client, or your Nortel IP Phone).

Global address book

The global address book is a list of all existing users in the domain. This list, in your domain, is maintained by your service provider or system administrator. Using the Personal Communicator Client, you can search on a user's Username/ UserID, Name, First name, Last name, or Phone number. (No information is displayed until a search parameter is entered.) You can initiate a call by double clicking or selecting an entry and clicking the **Make Call** button in the global address book.

Presence

The ability to configure automatic presence notifications on the Personal Communicator Client depends on whether this service is assigned to you. If you do not have automatic presence support, then you will not be able to use the automatic presence feature.

Presence is how you let other users know your status in the network. Use **Login, Change My Status** to change your presence state. This lets other users know whether you are online or unavailable. You can also set the system to automatically alert others whether you are away from your PC or on the telephone.

Tip: Exiting properly from the Personal Communicator Client is important since it updates your presence status in the network. Note that you may experience incorrect presence status until you log back in again or after a time-out period

Proxy server

A proxy server is an application that relays data between your Personal Communicator Client and the network. It is responsible for making sure your calls get to your registered access clients, like the Personal Communicator Client or Multimedia Web Client. When you connect to the proxy server you need to provide a valid username and password.

The IP address of the proxy server may already be defined in your Personal Communicator Client. If it is not, contact your administrator to obtain the proxy server configuration information.

Call logs

The Personal Communicator Client keeps a record of all incoming and outgoing calls. It stores these call log entries into an inbox (for incoming calls) and an outbox (for outgoing calls). Your system administrator determines the maximum number of incoming and outgoing call logs that can be stored on the Personal Communicator Client.

Call log entries will not be lost during a reinstallation of the Personal Communicator Client.

Acronyms

This guide uses the following acronyms:

A2E	Adaptive Application Engine
bpp	Bits per pixel
CODEC	coder/decoder
COM	Component Object Model
CS 2000	Communication Server 2000
DND	Do Not Disturb
DSL	Digital Subscriber Line
FPS	Frames Per Second
GUI	Graphical User Interface
IM	Instant Message
IP	Internet Protocol
IPCM	Internet Protocol Client Manager
ISDN	Integrated Services Digital Network
MWI	Message Waiting Indicator
LAN	Local Area Network
NAT	Network Address Translation
PC	Personal Computer
PSAP	Public Safety Answering Point
PSTN	Public Switched Telephone Network
SIP	Session Initiation Protocol
SSL	Secure Socket Layer
URL	Universal Resource Locator (internet address)
USB	Universal Serial Bus

Appendix B
Hardware notes

Topics in this section include:

- "Compatible video cameras and headsets" on page 267
- "Compatibility with the client application" on page 268

Compatible video cameras and headsets

The Personal Communicator Client requires video cameras that capture video in RGB-24, I420, or UYU2 video format, and the vast majority of USB 1.x web cameras meet these requirements.

Nortel can make no recommendation or statement of compatibility about which cameras and/or headsets work with the Personal Communicator Client on an individual user's PC. There are too many issues out of Nortel's control and influence for any concrete recommendations to be made.

Issues that may influence the operation of a camera are

- hardware revision of the CPU, CPU chipset, and motherboard
- software revision of CPU chipset and motherboard device drivers
- release and revision of the Windows operating system
- hardware revision of the camera
- software revision of the camera drivers
- the presence of other user-installed devices, USB or otherwise, which were previously installed on the user's PC. Other devices may cause issues whether they are still present or not.
- the installation of other software packages on the user's PC

Nortel is a manufacturer of compatible headsets and headset adapters that are suitable for many Personal Communicator Client users. Users are encouraged to contact their Nortel representatives or distributor for more information.

Compatibility with the client application

The responsibility of ensuring compatibility of the camera with the Personal Communicator Client application is critical. Compatibility is usually indicated by successfully installing the camera, seeing the camera recognized by the client application, and proper behavior of the Personal Communicator Client application during and after several video telephony phone calls.

The following guidelines are recommended:

- Evaluate the camera in person before purchasing.
- If multiple computers with different versions of the Windows operating system are going to be used with the camera, evaluate the camera on all operating systems before purchasing.
- If multiple computers with different hardware configurations are going to be used with the camera, evaluate the camera on all hardware configurations before purchasing.
- Before installing a camera on a computer, always visit the camera vendor's web site for updated camera drivers, and use the updated drivers if available.

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